



Commander  
United States Coast Guard  
Maintenance & Logistics Command  
Atlantic

300 East Main St; Suite 900  
Norfolk, VA 23510-9104  
Staff Symbol: pf  
Phone: 757-628-4506

MLCLANTINST 1300.2  
MLCPACINST 1300.2  
30 JANUARY 2006

MAINTENANCE AND LOGISTICS COMMAND ATLANTIC INSTRUCTION 1300.2  
MAINTENANCE AND LOGISTICS COMMAND PACIFIC INSTRUCTION 1300.2

Subj: STANDARDIZATION OF FORCE OPTIMIZATION AND TRAINING PROCESSES

Ref: (a) Policy for Plans to Integrate Reserve and Active Forces, COMDTINST 5310.2  
(b) Integration of District Readiness and Reserve Division Functions Into Other Staff Elements, COMDTINST 5400.21  
(c) Reserve Strategic Assessment Team (RSAT) Final Report

- PURPOSE.** This instruction establishes standard processes and procedures regarding reserve program management for Force Optimization and Training Branches at Maintenance and Logistics Commands and subordinate Integrated Support Commands (ISCs).
- ACTION.** Commanding Officers of all Atlantic and Pacific Area field units with SELRES billets, Commanding Officers, Integrated Support Commands and Personnel Division Chiefs at Maintenance and Logistics Commands shall ensure compliance with the provisions of this instruction. Internet release is authorized.
- DIRECTIVES AFFECTED.** MLCLANTINST 1300.1 Assignment Policies for Senior Reserve Officers is superseded and cancelled.
- BACKGROUND.** References (a) and (b) directed the integration of Reserve forces into active duty units, established Force Optimization and Training Branches at MLCs and ISCs, and delineated roles and responsibilities at multiple levels of the chain of command for OPCON/ADCON over reserve members. This instruction is written to ensure Force Optimization and Training processes and procedures pertaining to reserve program management are standardized to ensure consistency in execution across the Coast Guard in order to better serve our external customers.
- DISCUSSION.**
  - Reference (c) identified a number of gaps associated with reserve workforce management and assignments and specifically recommended more standardization across the Coast Guard to

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- (b) Enclosure (1), the Atlantic and Pacific Area Force Optimization and Training; Reserve Management Guidebook, is the result of a collaborative effort between MLCLANT and MLCPAC to address these process gaps identified in the RSAT. This Guidebook contains all the standard processes and procedures that shall be followed by all Atlantic and Pacific Area units with SELRES billets and by MLC and ISC Force Optimization and Training Branches in carrying out their duties. This guidebook shall be implemented upon receipt.

6. ENVIRONMENTAL ASPECTS AND IMPACT CONSIDERATIONS. None.

7. FORMS/REPORTS. None.

//s//

C. I. PEARSON

Rear Admiral, U. S. Coast Guard

MLC Atlantic

//s//

J. A. BRECKENRIDGE

Rear Admiral, U. S. Coast Guard

MLC Pacific

Encl: (1) Atlantic and Pacific Area Force Optimization and Training; Reserve Management Guidebook

# UNITED STATES COAST GUARD

## INTEGRATED SUPPORT COMMAND

FORCE OPTIMIZATION AND TRAINING BRANCH



## RESERVE GUIDEBOOK

MLCLANTINST 1300.2  
MLCPACINST 1300.2

## Chapter 1 – Reserve Components

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## Reserve Components

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### General Information

For administrative purposes, reservists are placed in one of three Reserve Component Categories (RCC):

- (1) Ready Reserve
  - (2) Standby Reserve
  - (3) Retired Reserve
- 

### Ready Reserve

Most reservists are in the two Ready Reserve sub-categories:

- (1) Selected Reserve (SELRES): Those obligated to perform 48 Inactive Duty Training (IDT) drills and 12 days of Active Duty for Training-Annual Training (ADT-AT) a year for retirement points and pay
  - (2) Individual Ready Reserve (IRR): Reservists in the IRR do not drill for pay, but may do so for retirement points only. IRR members are eligible to apply for Active Duty Special Work (ADSW) or Readiness Management Periods (RMPs) for pay. Individuals in the IRR are waiting to fulfill their military service obligation (MSO), or if MSO is already satisfied, those who voluntarily remain in the IRR. IRR members are subject to involuntary recall
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### Standby Reserve

The Standby Reserve consists of members not in the Ready Reserve or the Retired Reserve, but who are subject to recall, generally after IRR resources have been utilized. Standby Reservists may not apply for Readiness Management Periods (RMPs) or Active Duty Special Work (ADSW) contracts.

The Standby Reserve is divided into two sub-categories:

- (1) Active Status List, Standby Reserve: Comprised of members who may be recalled to active duty if not enough qualified Ready Reservists are available. Members may drill for points without pay and are eligible for promotion
  - (2) Inactive Status List, Standby Reserve: Contains reservists who may be recalled to active duty if not enough qualified Ready Reservists are available. Members may not train for pay or points and are not eligible for promotion. Time spent in this status does not count towards retirement years
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## Reserve Components (Continued)

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### Retired Reserve

Members of the Retired Reserve have met the eligibility requirements for regular retirement and have requested a transfer to retired status and those who have been retired for physical disability. Retired reservists are not considered or eligible for promotion. They are, however, subject to recall and may be forced to attend training sessions or earn retirement points.

The three sub-categories of the Retired Reserve are:

- (1) RET-1: Members have met the minimum time-in-service requirements for non-regular retired pay (at, or after age 60)
- (2) RET-2: Members have met the minimum time-in-service requirements for non-regular retired pay and are not yet 60 years old. If past 60, members have not applied for non-regular retirement pay
- (3) Disability Retiree: Reservists have retired for physical disability reasons. Members have completed 20 years of service (“good” retirement years) or are 30% or more disabled and otherwise disqualified

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### References

Reserve Policy Manual, COMDTINST M1001.28A

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## Reserve Requirements

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### General Information

Reservists are obligated to meet three main readiness requirements, which contribute to the readiness of the Selected Reserve (SELRES). Non-compliance with the requirements will result in disciplinary action, up to and including being discharged from the Coast Guard.

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### Readiness Requirements

The three reserve participation requirements are:

- (1) Satisfaction of annual Inactive Duty Training (IDT) and Active Duty for Training-Annual Training (ADT-AT) obligations
  - (2) Successful completion of physical and dental exams
  - (3) Completion of Annual Screening Questionnaire (ASQ)
- 

### IDT and ADT-AT Requirements

Inactive Duty Training (IDT): Members are authorized 48 paid drills per fiscal year. Some deployable units, such as Port Security Units (PSUs), are authorized 60 paid IDT drills per year. Minimum participation standards mandate members attend at least 90% of all scheduled IDT drills.

Active Duty for Training-Annual Training (ADT-AT): To meet the annual service obligation for ADT, reservists must perform at least 12 training days per fiscal year. This is in addition to the IDT requirements.

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### Physical and Dental Requirements

Reservists are required to be physically qualified for service. Periodic dental and physical exams aid in ensuring readiness and positively impact the Coast Guard.

Physical Examinations: Reserve members must receive a physical exam quinquennially, or once every five years from age 20 to 50. Policy requires reservists whose age ends in “0” or “5” be examined. For example, a 28-year old must receive a physical during the month of their 30<sup>th</sup> birthday, and again when they turn 35.

After age 50, an annual physical is required.

Physical examinations provided to reservists as part of the demobilization process are valid for five years. It is recommended that the member be examined on their next “0” or “5” birthday for easier record keeping and continuity.

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## Reserve Requirements (Continued)

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### Physical and Dental Requirements (continued)

Dental Examinations: All SELRES members are required to receive an annual Type II dental examination (requires use of a light, mirror and X-rays) and be medically cleared for service. Reservists not in Dental Class I or II are not ready for worldwide deployment. The Coast Guard mandates an exam only; no dental cleaning is required.

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### Annual Screening Questionnaire (ASQ)

At the beginning of every fiscal year, all reservists regardless of component category, are required to fill out the Annual Screening Questionnaire (ASQ). The survey ensures vital recall information is accurate. Members are required to answer the ASQ even if no information has changed over the past year.

Reservists should update their ASQ records when contact information has changed.

There are three ways to complete the ASQ:

- (1) Direct Access
  - (2) Online and Hard-Copy
  - (3) Hard-Copy (ASQ CG PSC –3799R)
- 

### Direct Access (DA)

Log on to Direct Access (DA). Click on Self-Service > Employee > Tasks > Annual Screening Questionnaire.

Fill out the ASQ acknowledgement. The choices are “I understand and accept” and “I do not understand or do not accept.” If you select “I understand and accept” choose “Available” in the Recall Availability dropdown.

If “I do not understand or do not accept” option is selected, this may have serious repercussions, and could result in a temporary transfer to the Standby Reserves or a discharge. Members must contact their supervisors immediately if this answer is selected.

Once this acknowledgement is complete, click on “Personal Information.” Update any invalid information. Click “Save.”

Reservists whose e-mail addresses are entered in DA will have an ASQ reminder sent to them each year.

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## Reserve Requirements (Continued)

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<b>Online and Hard-Copy</b>	The Reserve ASQ (CG PSC-3799R) is available online from the Personnel Service Center (PSC). Once downloaded and printed, forms are to be mailed to the servicing unit yeoman.
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<b>Hard-Copy</b>	<p>Members who have not provided DA with an e-mail address will be mailed an ASQ annually. If, by the end of the fiscal year, a form is not received, contact your unit to ensure the correct address is on file.</p> <p>Members shall mail completed CG PSC-3799R forms to their units within 30 days of receipt. A yeoman will update the DA information for the member.</p>
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<b>Mobilization</b>	<p>If you are not available for mobilization:</p> <ol style="list-style-type: none"> <li>(1) Due to employment or occupation, ensure your employer has filed the proper documentation. Your position must be classified as exempt under 44 CFR 333</li> <li>(2) Due to hardship, provide documentation. See article 5.C.3 of the Coast Guard Manpower Mobilization and Support Plan, COMDTINST M3061.1 for the definition of a hardship.</li> <li>(3) Due to a physical disqualification, provide documentation from your doctor</li> </ol>
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<b>References</b>	<p>Reserve Policy Manual, CONDTINST M1001.28A          Coast Guard Medical Manual, COMDTINST M6000.1B          Personnel and Pay Procedures Manual, PSCINST M1000.2A</p>
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<b>Additional Information</b>	<p>U. S. Coast Guard Reserve: <a href="http://www.uscg.mil/reserve/reshmpg.html">http://www.uscg.mil/reserve/reshmpg.html</a>          Direct Access: <a href="https://hr.direct-access.us/">https://hr.direct-access.us/</a>          Forms and Worksheets: <a href="http://www.uscg.mil/hq/psc/forms/index.htm">http://www.uscg.mil/hq/psc/forms/index.htm</a>          Personnel Service Center ASQ Form:  <a href="http://www.uscg.mil/hq/psc/forms">http://www.uscg.mil/hq/psc/forms</a>          Code of Federal Regulations: <a href="http://www.gpoaccess.gov/cfr/index.html">http://www.gpoaccess.gov/cfr/index.html</a></p>
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## Standby Reserve

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<b>General</b>	The Standby Reserve consists of members not in the Ready Reserve or
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**Information** the Retired Reserve but who are subject to recall in times of war or national emergency. Members may be ordered to active duty if it is determined there are insufficient Selected Reserve or Individual Ready Reserve forces to meet mobilization demands.

Reservists placed in the Standby Reserve are assigned to the Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm).

The Standby Reserve is divided into two sub-categories:

- (1) Active Status, Standby Reserve
- (2) Inactive Status, Standby Reserve

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**Active Status** Members of the Standby Reserve in an Active Status are placed on the Active Status List (ASL). Members may participate in training activities without pay, may earn retirement points, are eligible for promotion, and can earn credit for qualifying years of service towards retirement.

Those placed on the ASL include members who have been transferred from the Ready Reserve due to temporary hardship or disability who intend on returning to a drilling status, “key personnel” (government and judicial figures removed from the Ready Reserve who are critical to national security), and full-time students of medicine, theology, or divinity.

Also, officers who have been passed over twice for promotion, who have 18 but fewer than 20 years of service, are placed in the Active Status, Standby Reserve.

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**Inactive Status** Members of the Standby Reserve in an Inactive Status are placed on the Inactive Status List (ISL). Members may not train for pay or retirement points, are not eligible for promotion, and do not accrue credit for qualifying years of service towards retirement.

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## **Standby Reserve (Continued)**

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**Inactive Status (continued)** Those on the ISL are required to promptly advise their command of any change in residence, marital status, number of dependents, employment

changes, health conditions or anything impacting a member's availability for active military service.

Members placed on the ISL may include those not required by law or regulation to remain in an active program yet in lieu of separation retain their affiliation in a non-participating status, and those who have skills that may be of possible future use to the Coast Guard.

The Commandant may place reservists on the ISL who have exceeded their maximum allowable weight standards for up to one year. If the member attains his or her proper weight or body fat, they may be transferred back to the Ready Reserve. If after that year they have not attained their proper weight or body fat, they will be processed for separation. Reserve officers who fail to earn the minimum retirement points for a given year may also be transferred to the ISL.

Reserve officers passed over for promotion twice, not recommended for continuation in an active status, or those who have not requested retirement (if eligible) and have not been discharged, are placed on the ISL.

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### **Uniforms**

Members of the Standby Reserve are required to maintain their uniform issue for a period of four years. If an enlisted reservist returns to the SELRES or is recalled to active duty after a four-year period, they may request a new initial uniform issue. The Office of Reserve Affairs-Reserve Funds Management Division (G-WTR-3) handles new initial uniform issues. Members must complete the "Receipt For Clothing and Small Stores" form (CG-3019 for males and CG-3019A for females).

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### **Temporary Physical Disqualification Transfer**

Members of the Selected Reserve (SELRES) with a non-service connected temporary physical disability may be transferred to the Standby Reserve. A temporary disability is a disability temporary in nature, but is expected to last for four months or more.

For transfer back to the Ready Reserve from the Standby Reserve when a temporary physical disqualification no longer exists, documentation from a civilian healthcare provider can be used to support the transfer if

## **Standby Reserve (continued)**

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### **Temporary Physical Disqualification**

no Military Treatment Facility (MTF) is available. The member must present this documentation to the local Coast Guard Health Services

**Transfer (continued)** Provider for a Fit For Full Duty determination. A Readiness Management Period (RMP) without pay can be issued by the servicing ISC (pf) to provide an evaluation to support the transfer.

If a local MTF is available, the member may be examined there at the discretion of the servicing ISC (pf) or Maintenance and Logistics Command (MLC).

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**Transfer Process to  
ASL or ISL from  
SELRES**

Member:

- (1) Meet with supervisor, discuss intentions
- (2) Write letter of intent and E-Résumé to CGPC-rpm via Chain of Command
- (3) Submit letter to Command

Command:

- (1) Endorse request
- (2) Forward to servicing ISC (pf)

ISC (pf):

- (1) Endorse request
- (2) Forward to CGPC-rpm

CGPC-rpm:

- (1) Approve or deny request
  - (2) Notify member's command, member, and servicing ISC (pf)
  - (3) Remove member from SELRES status
- 

**Transfer from ASL  
or ISL to SELRES**

Member:

- (1) Write change in status request using Coast Guard memorandum format to CGPC-rpm
- (2) If on ASL, submit to supervisor
- (3) If on ISL, forward to nearest ISC (pf)

Supervisor:

- (1) Endorse request
  - (1) Forward to servicing ISC (pf)
- 

**Standby Reserve (continued)**

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**Transfer from ASL  
or ISL to SELRES**

ISC (pf):

- (1) Check RPAL for vacant billet

**(continued)**

- (2) Endorse request
- (3) If positive endorsement, include proposed billet number
- (4) Forward to CGPC-rpm

CGPC-rpm:

- (1) Ensure current physical exam is on file
- (2) Approve request
- (3) Remove from ASL or ISL
- (4) Notify ISC (pf)

ISC (pf):

- (1) Issue orders in Direct Access
- (2) Notify member
- (3) Notify command

Member:

- (1) Drill as ordered

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Allowable Weight Standards for Coast Guard Military Personnel,  
COMDTINST M1020.8D

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**Additional  
Information**

CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>

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## Individual Ready Reserve (IRR)

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**General  
Information**

The Individual Ready Reserve (IRR) is a Ready Reserve manpower pool consisting mainly of individuals separated from active duty or the

Selected Reserve (SELRES) and still have a military obligation to fulfill. IRR members are in an active status, but do not perform regularly scheduled training or Inactive Duty Training (IDT) drills.

Members of the IRR may advance, accrue retirement points and service years, and train annually, although training is not required. Since those in the IRR do not belong to any unit, it is up to the individual to complete the correspondence courses required for drill points and find a command that has the money to pay for annual training, if desired.

The Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) is responsible for the management of IRR members. Refer to CGPC-rpm for particulars on the accession process.

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**Partial  
Mobilization**

IRR members may be involuntarily recalled upon declaration of a national emergency. The President or Congress can order a partial mobilization of up to 1 million SELRES and IRR members. Partial mobilization can be for national emergencies involving threats to national security or in response to domestic emergencies such as natural disasters, accidents, or catastrophes.

Under a partial mobilization, reservists can be involuntarily kept on active duty for no longer than 24 cumulative months.

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**IRR Participation  
Requirements**

Members of the IRR are required to:

- (1) Promptly advise their command of any change in residence, marital status, number of dependents, employment changes, health conditions or anything that would have an impact on a member's availability for active military service
- (2) Fill out the Annual Screening Questionnaire (ASQ) even if no information has changed over the past fiscal year. The ASQ is available online (refer to the Reserve Requirements section for details)
- (3) Answer all official correspondence
- (4) Meet minimum training requirements for Training and Pay Categories (TRA/PAY CATs) in accordance with article 1.D.3 of the Reserve Policy Manual (RPM).

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**Individual Ready Reserve (IRR) (Continued)**

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**IRR Participation  
Requirements**

Members of the IRR are required to (continued):

- (5) Maintain physical fitness requirements and weight standards

**(continued)**

- (6) Accrue a minimum of 50 retirement points in an anniversary year to be retained in an active status (officers only)

Failure to meet any of the above obligations will lead to administrative action.

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**Training and Pay Categories**

TRA/PAY CATs E and H are for IRR members not required to meet the same Active Duty for Training-Annual Training (ADT-AT) and Inactive Duty Training (IDT) training requirements as SELRES members.

TRA/PAY CAT E is for reservists without access to drilling units who have some period of their military service obligation (MSO) or other contractual obligation remaining. Members are not required to drill, but are required to perform ADT-AT with pay up to 30 days per fiscal year.

TRA/PAY CAT H is for reservists with no requirement to drill who may voluntarily participate in training without pay.

Required training for IRR members shall not exceed 30 days per fiscal year. Members may voluntarily participate in training for retirement points and promotion, with or without pay.

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**Uniforms**

Members of the IRR are required to maintain their uniform issue for a period of four years. If an enlisted reservist returns to the SELRES or is recalled to active duty after a four-year period, they may request a new initial uniform issue.

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**Travel Notification Requirements**

Members of the SELRES and IRR do not need permission to travel outside the United States. However, for travel outside the United States in excess of 30 days, members are required to notify CGPC-rpm, in writing, for a security briefing. Refer to the Reserve Policy Manual for details.

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**Individual Ready Reserve (IRR) (Continued)**

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**Healthcare Benefits**

Members of the IRR recalled to active duty for more than 30 consecutive days are entitled to medical and dental coverage for

themselves and their families. Coverage is available through TRICARE, the military's health care program. Members are responsible for enrolling in health care programs for themselves and family members when recalled to active duty. It is not done automatically.

Benefits for members and their families are not available while the member is inactive.

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**IRR Transfer Chain  
of Responsibility**

Member:

- (1) Request meeting with supervisor to discuss transfer into IRR

**NOTE:** Members with a military service obligation cannot transfer to the IRR

Supervisor:

- (1) Schedule and meet with member to discuss intentions, service needs, departure impact on career progress, military service obligation, and ability to repay any bonus funds received
- (2) Advise member of other options besides IRR (retirement, etc.) if transfer is voluntary

Member:

- (1) Use Coast Guard Direct Access Assignment Data Worksheet (CG PSC-2002) or write change in status request using Coast Guard memorandum format. If a hardship is claimed, enclose supporting documents
- (2) Submit request to command for endorsement
- (3) Continue to drill until transfer request approved and orders are completed by CGPC-rpm

Command:

- (1) Endorse IRR transfer request
- (2) Provide command validation if member claims hardship, complete required documentation as per section 5.B.2 of the Reserve Policy Manual
- (3) Verify member's remaining drilling obligation
- (1) Forward to servicing ISC (pf)

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**Individual Ready Reserve (IRR) (Continued)**

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**IRR Transfer Chain  
of Responsibility**

ISC (pf):

- (1) Evaluate and endorse IRR transfer request

(continued)

(2) Forward request to CGPC-rpm

CGPC-rpm:

- (1) Evaluate request
- (2) Consider needs of service, member's skill sets, contractual obligations, bonuses or other incentives paid to member, hardship claims, and other factors relating to the transfer
- (3) Approve or deny request
- (4) Notify servicing ISC (pf) of decision in writing

ISC (pf):

- (1) Notify member's servicing Personnel Reporting Unit (SPO)
- (2) Notify member's command

SPO:

- (1) Submit departing and reporting endorsement form ("8C")

Unit:

- (1) Inform member of IRR ruling
- (2) Ensure member completes unit checkout procedure (including government credit card disposition).

Member:

- (1) Review Leave and Earning Statement (LES) for IRR transfer status

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**IRR to SELRES  
Chain of  
Responsibility**

Member:

- (1) Contact CGPC-rpm to discuss transfer to SELRES

CGPC-rpm:

- (1) Review member's record
  - (2) Determine if member should be reassigned to SELRES after meeting criteria established by CGPC-rpm
  - (3) Contact ISC (pf) for position information
  - (4) Approve accession to SELRES
  - (5) Notify ISC (pf)
- 

## **Individual Ready Reserve (IRR) (Continued)**

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**IRR to SELRES  
Chain of**

ISC (pf):

- (1) Check Reserve Personnel Allowance List (RPAL) for available

**Responsibility  
(continued)**

- position
- (2) Determine if billet is within member's Reasonable Commuting Distance (RCD) (though no RCD billet does not prevent assignment)
  - (3) Authorize a Readiness Management Period (RMP) for member to receive a physical examination (if member has been in IRR for more than one year) approved by servicing Maintenance and Logistics Command (MLC) (funded by ISC (pf) though IRR members managed by CGPC-rpm)
  - (4) If applicable, notify member of RMP approval and examination requirement

**Member:**

- (1) With assistance from servicing ISC (pf), schedule and receive physical examination at military facility

**ISC (pf):**

- (1) Upon medical clearance, assign position number to member
- (2) Notify CGPC-rpm of member's new SELRES status, position number, and effective date

**CGPC-rpm:**

- (1) Complete transfer transaction for member

**Member:**

- (1) Report to unit as ordered

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**Departing the IRR**

GCPC-rpm maintains control over members of the IRR and handles the departure process. All questions and inquiries should be directed to CGPC-rpm and not ISC (pf).

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## Individual Ready Reserve (IRR) (Continued)

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Personnel Manual, COMSTINST M1000.6A

Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Military Personnel Data Records (PDR) System, COMDTINST  
M1080.10E  
Allowable Weight Standards for Coast Guard Military Personnel,  
COMDTINST M1020.8D

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
IRR Uniform Policy: [http://cgweb.uscg.mil/g-  
w/reserve/UniformPolicy.htm](http://cgweb.uscg.mil/g-w/reserve/UniformPolicy.htm)  
Memorandum Format: [http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-  
cim/directives/CIM/CIM\\_5216\\_4C.pdf](http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM_5216_4C.pdf)  
CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>  
TRICARE: <http://www.tricare.osd.mil/reserve/>

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## Inactive Duty Training (IDT)

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**General  
Information**

A drill is a period of authorized duty performed by a reservist not on active duty called IDT, or Inactive Duty Training. The purpose of IDT

is to provide unit readiness and training, conduct administrative duties, or conduct funeral honors.

Reservists in the Selected Reserves (SELRES) are authorized 48 paid drills per fiscal year, while those assigned to deployable units, such as Port Security Units (PSUs), are authorized 60 paid IDT drills per year.

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**Inactive Duty Types**

The four types of inactive duty are:

- (1) Single IDT Drill
  - (2) Multiple IDT Drill
  - (3) Readiness Management Period (RMP)
  - (4) Funeral Honors Duty (FHD)
- 

**Single and Multiple Drills**

A Single Inactive Duty Training (IDT) drill is a four-hour block of work time, earning the reservist one retirement point, satisfying one of the 48 required annual drills.

A Multiple IDT drill is full work day, eight hours or more in duration, earning the reservist two retirement points, satisfying two of the 48 required annual drills. Members may work two drill periods per day, regardless of the number of hours worked.

Travel times or meal breaks do not count towards the four-hour minimum drill period.

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**Readiness Management Period (RMP)**

Readiness Management Periods (RMPs) are used to provide additional training to maintain readiness, training administration, or maintenance functions. Supervisors preparing for an upcoming weekend drill may be authorized an RMP with pay by the servicing ISC (pf).

Drills performed in excess of the required annual IDT are non-paid drills. If the requisite conditions are met, it is advantageous for the member to request a paid RMP in lieu of non-paid IDT drill.

Each RMP must be at least three hours in duration. RMPs are limited to one per day and there is a limit on the number of RMPs authorized per fiscal year.

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**Inactive Duty Training (IDT) (Continued)**


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**Readiness Management Period**

RMPs will not be authorized for members who fail to meet participation standards.

**(RMP) (continued)**

Only the ISC (pf) may authorize an RMP, with or without pay. If an RMP without pay is scheduled, that command has the authority to issue orders with or without travel pay. Travel funds and order processing are the responsibility of the unit, not the ISC (pf).

Each RMP, regardless of duration, is equivalent to one IDT drill for pay (if authorized) and retirement point purposes.

A medical examination before a period of mobilization is an acceptable use of an RMP. IDT drills should not be used to obtain Coast Guard mandated physical exams (quinquennial or annual physicals, mammograms, gynecological visits, colonoscopies, and dental check-ups). RMPs may be authorized for these requisite examinations.

RMPs will not be performed the same day as any Active Duty for Training (ADT) or IDT drills.

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**Funeral Honors Duty (FHD)**

Funeral Honors Duty (FHD) includes the preparation and performance of a military funeral.

Reservists who perform FHD earn \$50 and one retirement point if service is in excess of two hours.

Travel allowance may be authorized if reservists reside more than 50 miles from the service site.

Funeral Honors Duty is considered separate duty and cannot be performed as part of IDT, ADT, or an RMP. A single drill is authorized before or after the funeral services.

FHD is limited to one funeral per day.

There is no retirement point-cap for funeral services performed per year.

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**Inactive Duty Training (IDT) (Continued)**

**Participation Requirements**

Minimum participation criteria require members to attend at least 90% of all scheduled drills. Reservists who are unable to perform scheduled IDT must inform their supervisors immediately. Excused drills can be rescheduled to accommodate civilian work schedules, but at least 48

hours of advanced notice is required.

If it is not possible to give advanced notice of conflict, drills may be rescheduled for the following reasons:

- (1) Illness or injury of reservist
- (2) Serious or unusual hardship due to unforeseen emergency
- (3) Accident or illness of a family member, requiring presence or other action by the reservist
- (4) Death or imminent death of a member of the immediate family
- (5) Commanding Officer's discretion

Reservists who have been placed on active duty (voluntary or involuntary recall) during their normally scheduled IDT drills are not required to complete the missed drills. The active duty service overrides the monthly IDT drill requirements. For example, if a member is on active duty for two months, they are not required to make up the weekend drills missed during the active duty period. The eight skipped drills do not need to be rescheduled; the reservist's annual drill obligation is lowered to 40. Missed IDT drills may be made up, but demobilized reservists are not obligated to do so.

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### **Drill Regulations**

Drills will be considered invalid for pay/points if certain criteria are not met or drill categories are in conflict. When scheduling or reporting drills, be reminded that:

- (1) One IDT drill is at least four hours in length
- (2) Two single drills per day are not authorized; report a multiple drill
- (3) Two multiple drills per day are not authorized
- (4) Members cannot exceed two IDT drills per day; there is no such thing as a "triple" drill
- (5) Two RMPs on the same day are not authorized
- (6) An RMP and a single drill on the same day are not authorized
- (7) An RMP and a multiple drill on the same day are not authorized
- (8) An RMP without approval from ISC (pf) is not authorized
- (9) Reservists may not drill when on travel orders (e.g. cannot do IDT on an ADT travel day)

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## **Inactive Duty Training (IDT) (Continued)**

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### **Benefits and Entitlements**

When working under a pay status, one IDT drill is worth 1/30<sup>th</sup> of the active duty monthly base pay. A reservist drilling over a weekend earns 4/30<sup>th</sup> of the active duty monthly base pay and satisfies four of the 48 IDT drills required per year.

Each completed IDT drill earns the reservist one retirement point.

In addition to pay and retirement points, enlisted reservists earn Reserve Basic Maintenance Allowance (RBMA) or Reserve Standard Maintenance Allowance (RSMA), and, if permitted, meal allowances. Officers performing IDT for pay are not authorized these entitlements.

Enlisted SELRES members who serve for eight or more hours per day on IDT orders with pay are provided with Commuted Rations (COMRATS) and shall pay for their meals. There is no entitlement for officers. Enlisted personnel drilling without pay may be allowed COMRATS if the unit has an approved dining facility.

AFC-90 travel funds are not authorized while performing IDT. Travel for training or operations may be paid from the unit's AFC-30 account.

RMP travel allowances are authorized by the unit's command. If an RMP is needed for unit work, the unit pays for travel. Only privately owned vehicles are authorized for travel. If unit work warrants mileage and per diem, the unit pays. Berthing arrangements while performing unit work during an RMP are the responsibility of the unit. If an RMP requiring berthing is requested while not performing unit work (medical, etc.), berthing shall be paid for by the servicing ISC (pf) and regional ISC (pf) berthing procedures should be followed.

Travel allowances may be authorized for FHD if the reservist resides greater than 50 miles from the funeral site.

If berthing is required while performing IDT, appropriate government quarters shall be used whenever possible. If no government quarters are available, berthing should be arranged through the ISC (pf) via unit administrative personnel.

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**Drill Request  
Regulations**

Reservists must be scheduled to attend drills. Besides being a military requirement, orders protect the reservist if injured while traveling to and from IDT, and provide an authorized absence from the civilian workplace.

**Inactive Duty Training (IDT) (Continued)**

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**Drill Request  
Regulations  
(continued)**

Drills are to be processed at least two weeks in advance.

Reservists in a non-pay category are not authorized payment for IDT drills. Only reservists assigned to a drilling unit and in a pay status are entitled to pay and points for IDT. Reservists assigned to a unit in a

non-pay status receive retirement points only.

Submitting an IDT drill for pay does not override the reservist's pay status.

Excused IDT drills may be made up, but demobilized reservists are not obligated to do so.

---

**Requesting IDT Orders**

Reservists are now able to submit requests for reserve orders electronically using Direct Access (DA). DA is available online from any computer; a Coast Guard workstation is not required. DA combines the request, routing, approval processes, order issuance, and payroll transactions into one event.

Members without internet access may submit a paper request or request drill dates over the telephone, and have their supervisors enter the transaction in DA.

The reservist, supervisor (with Reserve IDT access role), or Personnel Reporting Unit (SPO) may schedule or edit a drill up to and including the drill date. After the drill day, only a Command User or SPO may complete, edit, un-excuse, or cancel the drill.

If the reservist changes a drill date after it has been authorized, the status returns to "Mbr Requested." The supervisor may reset the status to "Pending" again, but it is not required.

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## **Inactive Duty Training (IDT) (Continued)**

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**IDT Order Chain of Responsibility**

Command:

- (1) Coordinate drill dates and locations with members

Member (for Member-requested orders):

- (1) At least two weeks in advance of the desired drill date, log on to Direct Access (DA), or contact supervisor if internet not

available

- (2) Click on Self-Service > Employee > Tasks > Schedule Drills > Add/Schedule New Drill
- (3) Enter desired IDT dates and times, duty/drill type, meal code (if authorized), pay code, and all other required information (when drill is member requested, drill status will be “Mbr Requested,” the only status available)
- (4) Click “Save” when finished

**Command:**

- (1) Log on to DA
- (2) If drill request not entered in DA, enter for member
- (3) Authorize drill by changing status to “Pending”

**Member:**

- (1) Check e-mail for orders
- (2) Print orders; keep copy for personal records
- (3) Perform drill as scheduled

**Supervisor/SPO:**

- (1) Endorse member’s orders verifying member has completed drills as ordered; change status to “Completed” to generate pay transaction

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Pay Charts: <http://www.uscg.mil/hq/psc/>  
Direct Access: <http://www.uscg.mil/hq/psc/cghrms>

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## **IDT Berthing**

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**General  
Information**

While under Inactive Duty Training (IDT) orders, the Coast Guard has historically provided berthing to reservists who must travel beyond a Reasonable Commuting Distance (RCD). RCD is defined as 50 miles or 1.5 hours travel time under normal driving conditions from the reservist’s home to the IDT site.

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**Housing Guidelines** Whenever possible, transient government housing shall be used for IDT berthing. If housing at the station (Unaccompanied Personnel Housing (UPH), etc.) is not available, reservists may request berthing through ISC (pf).

Some units have a designated berthing coordinator who works with ISC (pf) Budgeting and Berthing personnel. If a unit has one, all berthing issues shall be brought to the unit coordinator. If there is no liaison, berthing is member-coordinated with the ISC (pf).

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**Funding** Reservists should be aware that funding for IDT berthing is a privilege and subject to availability. Berthing is not an entitlement and should not be confused with Active Duty for Training-Annual Training (ADT-AT) allowances. If funds are available, ISC (pf) will make berthing arrangements for the member.

If IDT berthing funds are not available, members must coordinate and pay for their berthing. Reservists are obligated to pay for all charges in excess of the room charge and will not be reimbursed.

Lack of funds or available berthing does not relieve the member of their IDT obligations.

Funds are based on fiscal year (FY) allocations. If the servicing ISC (pf) cannot make reservations due to pending FY funds, reservists may arrange their own berthing. If a member does procure their own lodging, they are obligated to pay for all charges and will not be reimbursed.

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## **IDT Berthing (Continued)**

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**Berthing Requests** A member requesting berthing should contact the ISC (pf) via telephone or e-mail (each ISC (pf) determines preference). Reservists must provide the following information:

- (1) Full name
- (2) Rank
- (3) Gender
- (4) Telephone number
- (5) Home address

(6) Requested check-in and check-out dates

Reservation requests can be started up to three months in advance of the drill date, but a minimum of 15 days of notice is required. For reservations during the month of September (last month of fiscal year), requests should be submitted no later than 01 August.

Orders or Travel Order Numbers (TONOs) are not needed to start the berthing process.

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**Processing**

ISC (pf) personnel reserve hotel rooms for reservists. After a verbal agreement has been made with the selected hotel, a written contract is faxed to the facility manager.

ISC (pf) personnel or unit berthing coordinators contact the reservist, via the same manner in which initial contact was made, and provides all hotel information and a confirmation number.

Depending upon the type of berthing procured, reservists can expect to be contacted anywhere from 7 to 30 days before the confirmed check-in date.

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**Lodging Regulations**

Orders and military identification shall be presented upon arrival.

The standard berthing arrangements call for double occupancy. Junior enlisted members will not share a room with E-7s and above. Officers will not be placed with enlisted personnel, nor will males and females be housed in the same room.

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**IDT Berthing (Continued)**

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**Lodging Regulations  
(continued)**

ISC (pf) contracted rooms are for drilling reservists only. Bringing spouses, children, or pets is not recommended. Rates are quoted for one person; additional out of pocket costs might be incurred. No room is guaranteed as a single occupancy room.

Members who want to remain in a hotel after the authorized dates must make arrangements with the particular hotel. Lodging requests are for

specific dates and the servicing ISC (pf) only pays for these dates.

If a member remains in the hotel for ADT-AT, berthing will not be arranged by ISC (pf). ADT-AT requires different berthing orders and fall under the authority of the servicing Personnel Reporting Unit (SPO). Members can be reimbursed by filling out a Travel Voucher (DD-1351-2), which is submitted to the Personnel Service Center (PSC) or electronically in the Unit Travel System (UTS), not ISC (pf). UTS is the preferred method for submitting travel claims. Submission of a Travel Voucher (DD-1351-2 will only be used for Reservists assigned to units without CGSW III connectivity.

Room service, Pay-Per-View, and other charges are the responsibility of the member. A government rate has been secured and the hotel is not authorized to charge the Coast Guard in excess of the pre-arranged rate. Each hotel faxes a receipt within seven days to ISC (pf) to protect against all excess and fraudulent charges.

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**Financial  
Information**

ISC (pf) handles all financial transactions, except the supplementary charges listed above. A personal or government credit card is not needed for IDT berthing.

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**Additional  
Guidelines**

Members who are required to leave home before 0545 to report for duty are authorized berthing the night prior to scheduled duty. This applies to reservists who travel in a privately owned vehicle (POV) only.

Members who cannot depart from duty and arrive home before 2100 may be authorized berthing on the night following the last day of duty. This applies to reservists who travel in a POV only.

Reservists who drill in block format are authorized berthing funds for weekends and/or non-work days. For example, if a member drills Monday through Friday for two consecutive weeks, but does not drill over the weekend, housing funds are authorized for the weekend.

## **IDT Berthing (Continued)**

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**Additional  
Guidelines  
(continued)**

If a reservation needs to be cancelled, the servicing ISC (pf) or unit berthing coordinator is to be contacted immediately. If a last-minute cancellation is needed, contact the hotel. "No-shows" may be responsible for the hotel room costs.

Berthing funds are not authorized for personal use. Reservists must drill during the authorized housing periods.

Members who amass delinquent hotel bills, display inappropriate conduct, or otherwise abuse the berthing program may be barred from future IDT berthing privileges.

Berthing while performing IDT drills is a privilege and subject to funding and hotel availability.

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**References**

Reserve Policy Manual, COMDTINST M1001.28A

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**Additional  
Information**

ISC Portsmouth Internet Berthing Request:  
[RequestBerthing@iscports.uscg.mil](mailto:RequestBerthing@iscports.uscg.mil)

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## Active Duty

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**General  
Information**

Active Duty (AD) is “full-time in the active military service of the United States. Such term includes full-time training duty, annual training duty, and attendance, while in the active military service, at a school designated as a service school by law or by the Secretary of the military department concerned.” (10 USC 101)

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**Types of Active**

For reservists, active duty is composed of two categories:

<b>Duty</b>	<ul style="list-style-type: none"> <li>(1) Active Duty for Training (ADT)</li> <li>(2) Active Duty Other than for Training (ADOT)</li> </ul>
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<b>Active Duty for Training (ADT)</b>	Active Duty for Training is used to provide reservists with individual or readiness training, or to provide formal courses of instruction through resident or exportable training.
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The types of ADT are:

- (1) Initial Active Duty Training (IADT)
  - (2) Annual Training (ADT-AT)
  - (3) Other Training Duty (ADT-OTD)
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<b>Active Duty Other than for Training (ADOT)</b>	Active Duty Other than for Training is used to provide support to either Coast Guard or Coast Guard Reserve missions.
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Types of ADOT are:

- (1) Active Duty Special Work (ADSW) in support of the Active Component (ADSW-AC) or the Reserve Component (ADSW-RC)
  - (2) Extended Active Duty (EAD)
  - (3) Reserve Program Administrator (RPA)
  - (4) Involuntary Active Recall (Title 10 or Title 14)
  - (5) Active Duty for Health Care (ADHC)
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<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A Personnel and Pay Procedures Manual, PSCINST M1000.2A 10 USC 101
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<b>Additional Information</b>	U. S. Coast Guard Reserve: <a href="http://www.uscg.mil/reserve/reshmpg.html">http://www.uscg.mil/reserve/reshmpg.html</a> U. S. Code: <a href="http://assembler.law.cornell.edu/uscode/">http://assembler.law.cornell.edu/uscode/</a>
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## Active Duty for Training (ADT)

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<b>General Information</b>	Active Duty for Training (ADT) is a type of active duty used for training reservists. This annual training can be either on-the-job training or formal academic training. Formal training can take place at Coast Guard Training Centers Cape May, Yorktown or Petaluma, the Coast Guard Academy, or at war and staff colleges.
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The purpose of ADT is to guarantee qualified reservists are able to fill

the needs of the Armed Forces during war, national emergency, or other times deemed necessary.

The types of ADT are:

- (1) Initial Active Duty Training (IADT)
- (2) Annual Training (ADT-AT)
- (3) Other Training Duty (ADT-OTD)

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**Initial Active Duty Training (IADT)**

Initial Active Duty Training (IADT) is the initial ADT period for non prior-service enlistees. Coast Guard Recruiting Command (CGRC) authorizes IADT orders, except Phase II IADT.

While IADT is a reserve-specific training tool, recruiters generally arrange “A” school sessions for reservists.

IADT is performed before a reservist may begin drilling at their unit. Training includes basic military and technical skill training. Depending on the enlistment program, this training is available in one long session or two shorter sessions. Students recruited under the RK program will drill in PAYCAT B during the inter-phase period between Phase I (basic training) and Phase II (“A” school).

The Reserve Policy and Programs Division (G-WTR-1) authorizes Phase II IADT for reservists recruited under the RK accession program. These orders are processed via the servicing ISC (pf).

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**Active Duty for Training-Annual Training (ADT-AT)**

Active Duty for Training-Annual Training (ADT-AT) is used to provide reservists with individual or readiness training, or to provide formal courses of instruction through resident or exportable training.

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## Active Duty for Training (ADT) (Continued)

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**Active Duty for Training-Other Training Duty (ADT-OTD)**

If additional training resources are needed to complete a specific qualification or a formal school, reservists may use Active Duty for Training-Other Training Duty (ADT-OTD). This category of active duty is used in addition to, and only after, ADT-AT or IADT. It is not to be used for general on-the-job training.

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<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A Personnel and Pay Procedures Manual, PSCINST M1000.2A
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<b>Additional Information</b>	U. S. Coast Guard Reserve: <a href="http://www.uscg.mil/reserve/reshmpg.html">http://www.uscg.mil/reserve/reshmpg.html</a> Reserve Policy and Programs: <a href="http://cgweb.uscg.mil/g-w/reserve/">http://cgweb.uscg.mil/g-w/reserve/</a>
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## Active Duty for Training-Annual Training (ADT-AT)

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<b>General Information</b>	Active Duty for Training-Annual Training (ADT-AT) is the minimum period of active duty reservists must perform each fiscal year to satisfy the training and participation requirements associated with their assignments. The primary purpose of ADT-AT is to provide individual or readiness training. Formal courses of instruction through resident or exportable training are appropriate uses of ADT-AT.
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<b>Participation Requirements</b>	All members of the Selected Reserve (SELRES) are required to perform 12 to 15 days of ADT-AT each fiscal year.
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ADT-AT may be performed during one consecutive period or in increments, depending upon training needs. Training must meet all requirements for ADT and be mobilization, rating, or qualification related.

Reservists who have been voluntarily or involuntarily mobilized for a period of 12 or more days do not have to meet the SELRES requirement for ADT-AT that fiscal year. The mobilization satisfies the annual active duty requirement.

Demobilized reservists returning to the SELRES have the option of completing ADT-AT. Though service obligations have been satisfied, members can coordinate ADT-AT, provided there is enough time in the fiscal year to execute orders and complete training. The same is true for missed IDT drills. Missed IDT may be made up, but demobilized reservists are not obligated to do so. Refer to the IDT section for details.

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#### **ADT-AT Regulations**

ADT-AT requirements are based on the fiscal year (FY) due to Congressional funding and the fact each reservist has a different anniversary year (AY). The FY starts 01 October. The AY is the period used for crediting of qualifying years for a non-regular retirement. The date used to determine the AY is established by the date the member entered into active service or into active status in a Reserve component.

For all members of the SELRES, ADT-AT shall not be less than 12 days and not more than 15 days, exclusive of travel time, each fiscal year. Maritime Safety and Security Teams, Harbor Defense Command Units, and Port Security Units (MSST, NCW, PSU) are authorized 15 days of ADT-AT.

### **Active Duty for Training-Annual Training (ADT-AT) (Continued)**

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#### **ADT-AT Regulations (continued)**

Primarily, it is the reservist's responsibility to make sure they meet ADT-AT requirements, though the member's command needs to consider the member's AY when planning ADT-AT.

ADT-AT may not be performed during other periods of active duty or while participating in Inactive Duty Training (IDT) drills.

Often members request "C" schools to satisfy their annual ADT-AT requirements. If a "C" school is less than 12 days in duration, it can be used to fulfill the service obligation. If a school is longer than 12 days, it might not be considered ADT-AT. Requests for courses that require

more than 12 days of active duty or requests for reservists who have already performed ADT-AT for the fiscal year are approved only after the ISC (pf) ensures the availability of funds. This active duty in excess of the annual requirement is called Active Duty for Training-Other Training Duty (ADT-OTD) if training is specialty or position related.

Reservists must be scheduled and approved to attend ADT-AT.

Active duty orders shall be in writing and sent to reservists in advance of the duty.

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**Benefits and Entitlements**

When working under ADT-AT orders, reservists earn active duty wages. Daily rates are calculated by dividing the monthly wages by 30.

Reservists earn one retirement point per day of ADT-AT.

Reservists also earn Basic Allowance for Housing, Basic Allowance for Subsistence/Separate Rations, and Cost of Living Allowance, (BAH, BAS/SEPRATS, COLA) (if applicable) and enlisted members receive a uniform allowance while on ADT-AT orders. Per diem may be authorized for members who reside greater than 50 miles from their duty site.

ADT-AT pay and allowances, and other incidentals are generally funded by the servicing ISC (pf).

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**Active Duty for Training-Annual Training (ADT-AT) (Continued)**

**Benefits and Entitlements (continued)**

Rental cars may be authorized and paid for by the servicing ISC (pf). Authorization is based on the nature of the request and mission requirements.

Berthing is arranged and funded by the unit when quarters are available on site. If quarters are not available, it is the responsibility of the member to secure and pay berthing costs. Members will be reimbursed for lodging if a travel claim is filled out properly and promptly.

If a flight is authorized, members in possession of a government credit card have the option of booking their own flight. If a member does not possess a government credit card, flights can be arranged through the

unit's designated travel office.

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**ADT-AT Request Regulations**

Commands shall ensure reservists meet participation standards prior to approving reserve order requests. Reservists shall not be issued orders to perform active duty unless they are in a Fit For Full Duty (FFFD) status and have current physical and dental exams on file. ISC (pf) may authorize a Readiness Management Period (RMP) for medical exams prior to the start of active duty. No orders will be approved until the ISC (pf) has received an FFFD notice.

Members seeking ADT-AT orders using Direct Access (DA) are to submit requests at least 30 days in advance of the desired start date, unless the request is for ADT-AT to be done in September (the last month of the fiscal year). Requests for September should be submitted no later than 01 August, or no less than 60 days before the requested start date.

Under extreme circumstances, members may start the ADT-AT request process without DA. Members may submit a Request for Reserve Orders (CG-3453) form to their command no later than 45 days before the requested start date. Commands are reminded that all paper requests need to be entered into Direct Access no later than 30 days before the desired start date.

Timely issuance of orders allows sufficient time for reservists to provide notification to civilian employers and family members. Orders also protect the reservist if injured while traveling to and from ADT-AT and provide an authorized absence from the civilian workplace.

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**Active Duty for Training-Annual Training (ADT-AT) (Continued)**

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**ADT-AT Request Regulations (continued)**

Reservists shall not report without orders. If orders are not received within two weeks of the desired ADT-AT start date, reservists shall contact their unit yeoman.

Orders will not be retroactively issued.

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**Requesting ADT-AT Orders**

Reservists are now able to submit requests for reserve orders electronically using Direct Access (DA). DA is available online from any computer; a Coast Guard workstation is not required. The electronic request eliminates the need to submit a CG-3453 form, and the subsequent processing. DA combines the request, routing, approval

processes, order issuance, and payroll transactions into one event.

Members without internet access may submit a paper request and have supervisors enter the transaction in DA.

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**Non-Consecutive  
ADT-AT**

ADT-AT is usually performed on consecutive calendar days. In rare instances, members may be approved for non-consecutive ADT-AT. Requests are processed in the same manner as consecutive ADT-AT.

With the release of Direct Access, members are required to submit a new request for orders for each separate period of active duty.

Current policy dictates that non-consecutive orders are not authorized for the convenience of the member. Commands determine the nature of the training duty is best accomplished in small increments. Non-consecutive orders are used for members who live near their unit, thereby eliminating the need for additional travel or lodging costs.

Each set of non-consecutive orders will be issued a new Travel Order Number (TONO) because when non-consecutive orders were entered into Direct Access for a period of time (90 days, for example), the reservist cannot do any other type of duty because orders are in the system and will block the entry of any other orders. Order issuing authorities must ensure that travel is only authorized for the first set of non-consecutive orders.

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## **Active Duty for Training-Annual Training (ADT-AT) (Continued)**

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**ADT-AT Chain of  
Responsibility**

Member:

- (1) At the beginning of the member's AY, meet with supervisor to discuss training requirements, service needs, and ADT-AT dates
- (2) If internet is not accessible, fill out CG-3453
- (3) Submit request to supervisor at least 45 days for CG3453 requests or 30 days for Direct Access requests (60 days if request is for September orders) before the requested ADT-AT start date
- (4) If member has internet access, log on to Direct Access to request orders
- (5) Click on Self-Service > Employee > Tasks > Reserve Orders
- (6) The Reserve Orders homepage will display. Click on "View/Complete Order Info"

- (7) Click on “Add a New Value” link to start a new request
- (8) Click “Add” button to continue
- (9) Under the “Reserve Specific Info” tab, select the type of duty and department
- (10) Click “Reserve Orders” tab to continue
- (11) Enter order’s start and end dates and other required information
- (12) Click “Save” button
- (13) Enter employee ID number of supervisor in “Forward To” block (if necessary, click on the magnifying glass icon to search for the number)
- (14) Click “Route for Approval”
- (15) Enter supervisor’s name, department identification number, if known, and click “Lookup”
- (16) Select supervisor’s name from list
- (17) Click “OK” to route the request to Supervisor

Supervisor and Unit Administrative Staff with Supervisor Approval:

- (1) Confirm reservist meets readiness requirements
- (2) If member submitted CG-3453, enter request in DA
- (3) Determine and approve duty, travel, and per diem entitlements
- (4) Review and approve order requests
- (5) Click “Save” to save the request and generate e-mail to ISC (pf) contact

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## Active Duty for Training-Annual Training (ADT-AT) (Continued)

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**ADT-AT Chain of Responsibility (continued)**

ISC (pf):

- (1) In DA Worklist or via e-mail, read order request
- (2) Verify funding availability
- (3) Review the request for accuracy of entitlements
- (4) Click “Save” to save the request and generate e-mail to member
- (5) If long-term Active Duty Special Work (ADSW) assignment approved, member is automatically removed from the Reserve Personnel Allowance List (RPAL) for the duration of the assignment (this billet is now considered open and available to be filled by another reserve member)

Unit Admin:

- (1) Provide signed original orders to member

Member:

- (1) Obtain signed original orders from unit administrative personnel
- (2) Perform ADT-AT as scheduled

Unit Admin

- (1) Indicate arrival/departure in DA after member reports/departs ADT-AT

Personnel Reporting Unit (SPO):

- (1) Record arrival/departure information tab
- (2) Click “Save” button to generate a R990, enabling member to be paid

Member:

- (1) Within 3 days of travel completion, submit electronic travel claim via Unit Travel System (UTS). Members assigned to units without UTS connectivity may submit a paper Travel Voucher (DD-1351-2).
  - (2) If on ADSW-AC (in support of the Active Component), notify ISC (pf) that obligation satisfied; request to be placed back in SELRES
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## Active Duty for Training-Annual Training (ADT-AT) (Continued)

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**ADT-AT Chain of Responsibility (continued)**

ISC (pf):

- (1) If member was on ADSW, place member back on RPAL (if the same or similar position is vacant at the member’s unit, member is removed from the unbudgeted position and placed in a budgeted position)
- (2) If no budgeted positions are available at the member’s unit, member may be assigned to another command
- (3) Ensure current medical and dental exams completed, current Annual Screening Questionnaire (ASQ) on file

Unit:

- (1) Within 2 days of receiving the DD-1351-2, complete administrative review of the voucher and forward to the Personnel Service Center (PSC) or assist member with electronic travel claim as necessary

PSC:

- (1) Process travel voucher for payment to member

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**Non-Paid ADT-AT**

Non-paid active duty is always voluntary. Active duty without pay accrues retirement points the same as active duty with pay.

Per diem is not normally authorized for reservists performing active duty without pay. Units may authorize per diem for reservists not working for pay while they are in a travel status.

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**ADT-AT Waivers**

If reservists are unable to perform the required ADT-AT, a waiver may be granted to the member. Unit commanding officers may authorize a waiver for assigned reservists based on sufficient cause. Sufficient cause includes:

- (1) Members who have requested and are within one year of retirement
- (2) Members whose rating or specialty skills are substantially maintained through their civilian employment, in fiscal years with limited ADT-AT funding (Office of Reserve Affairs- Reserve Funds Management Division (G-WTR-3) designates the “limited funding” status)
- (3) Members experiencing temporary physical disability documented by a physician or temporary family or personal hardship. These reasons must be completely documented.

## **Active Duty for Training-Annual Training (ADT-AT) (Continued)**

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**ADT-AT Waivers (continued)**

Reservists seeking a waiver should submit written requests to their commanding officer. If granted, a copy of the request and approval letter should be sent to the Servicing Personnel Office (SPO) and ISC (pf) for filing.

If a reservist asks for a waiver two years in a row, the commanding officer is no longer authorized to approve the request. The commanding officer shall forward the request letter to the servicing ISC (pf) for approval.

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**Cancellation of Orders**

Commands needing to terminate or amend a member’s orders shall notify the ISC (pf) immediately.

For cancellation requests, orders shall be returned to the issuing authority with a written explanation. The servicing SPO shall notify the ISC (pf) via e-mail of the cancellation.

After the ISC (pf) receives notice of a cancellation, funds will be reallocated to other personnel.

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<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A Personnel and Pay Procedures Manual, PSCINST M1000.2A
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<b>Additional Information</b>	U. S. Coast Guard Reserve: <a href="http://www.uscg.mil/reserve/reshmpg.html">http://www.uscg.mil/reserve/reshmpg.html</a> Forms and Worksheets: <a href="http://www.uscg.mil/hq/psc/forms/index.htm">http://www.uscg.mil/hq/psc/forms/index.htm</a> Pay Charts: <a href="http://www.uscg.mil/hq/psc/">http://www.uscg.mil/hq/psc/</a> Active Duty Allowances: <a href="http://www.dtic.mil/perdiem/rateinfo.html">http://www.dtic.mil/perdiem/rateinfo.html</a> Direct Access: <a href="http://www.uscg.mil/hq/psc/cghrms/">http://www.uscg.mil/hq/psc/cghrms/</a> PSC Topeka: <a href="http://www.uscg.mil/HQ/PSC/">http://www.uscg.mil/HQ/PSC/</a>
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## Active Duty for Training-Other Training Duty (ADT-OTD)

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<b>General Information</b>	<p>Active Duty for Training-Other Training Duty (ADT-OTD) is training in addition to Inactive Duty Training (IDT) and Active Duty for Training-Annual Training (ADT-AT). Many units require additional training to ensure readiness and each ISC (pf) funds ADT-OTD to compensate reservists.</p> <p>ADT-OTD training may be authorized to units and individuals to enhance proficiency, develop specialized skills, or mobilization requirements. Members should first satisfy their ADT-AT requirements and then request ADT-OTD.</p>
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<b>Participation Requirements</b>	ADT-OTD is not mandatory active duty. Reservists are required to perform only IDT drills and ADT-AT to satisfy service obligations.
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<b>ADT-OTD Regulations</b>	ADT-OTD must be used for specific qualifications or for a formal school. Acceptable uses of ADT-OTD include working to complete a
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certification, re-certification, qualification, or to complete a formal training course.

The training must be related to the member's Contingency Personnel Requirements List (CPRL) position, specialty, or rating.

The use of ADT-OTD for general unit missions without training benefit to the member is not authorized. ADT-AT requirements should first be met for general on-the-job training then request ADT-OTD if completing a qualification.

Reservists with 16 years or more of combined active service shall not perform any type of active duty except ADT-AT, unless authorized by the Commandant.

All ADT-OTD is funded by the servicing ISC (pf).

Commands shall ensure reservists meet readiness standards prior to requesting orders. Reservists shall not be issued orders to perform active duty unless they are in a Fit For Full Duty (FFFD) status have a completed Annual Screening Questionnaire (ASQ) on file. ISC (pf) may authorize a Readiness Management Period (RMP) for medical exams prior to the start of active duty. No orders will be approved until the ISC (pf) has received an FFFD notice.

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## **Active Duty for Training-Other Training Duty (ADT-OTD)**

### **(Continued)**

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#### **Benefits and Entitlements**

When working under ADT-OTD orders, reservists earn active duty wages. Daily rates are calculated by dividing the monthly wages by 30.

Reservists earn one retirement point per day of ADT-OTD.

Reservists also earn Basic Allowance for Housing, Basic Allowance for Subsistence/Separate Rations, and Cost of Living Allowance, (BAH, BAS/SEPRATS, COLA) (if applicable) and enlisted members receive a uniform allowance while on ADT-OTD orders. Per diem may be authorized for members who reside greater than 50 miles from their duty site.

ADT-OTD pay and allowances and other incidentals are generally funded by the servicing ISC (pf).

If a rental car is authorized, it will be paid for by the servicing ISC (pf).

Authorization is based on the nature of the request and mission requirements.

Berthing is arranged and funded by the unit when quarters are available on site. If quarters are not available, it is the responsibility of the member to secure and pay berthing costs. Members will be reimbursed for lodging if a travel claim is filled out properly and promptly.

If a flight is authorized, members in possession of a government credit card have the option of booking their own flight. If a member does not possess a government credit card, flights can be arranged through the unit's designated travel office.

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**ADT-OTD Request  
Regulations**

Each ISC (pf) has limited funding available for ADT-OTD. Requesting ADT-OTD funds does not guarantee approval. If funds are not available, the ISC (pf) will notify the member or unit yeoman.

Funds will be allocated to members and units with the highest training priorities.

Each ISC (pf) solicits ADT-OTD requests annually. Commands should submit their OTD projections on time. This helps project and prioritize training needs and aids in establishing a preliminary budget.

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**Active Duty for Training-Other Training Duty (ADT-OTD)  
(Continued)**

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**ADT-OTD Request  
Regulations  
(continued)**

Each ISC (pf) can approve ADT-ODT requests for up to 30 days per reservist, per fiscal year.

Reservists shall not perform more than 30 days of ADT-OTD in a fiscal year without prior approval from the Office of Reserve Affairs-Reserve Funds Management Division (G-WTR-3).

Order requests for longer than 30 days are generally authorized by G-WTR-3 and processed by the servicing ISC (pf).

Members working under ADT-OTD orders greater than 30 days in length must obtain an active duty identification card.

Requests are to be submitted at least 30 days in advance of the desired start date, 45 days if not requested via Direct Access.

Timely issuance of orders allows sufficient time for reservists to provide notification to civilian employers and family members. Orders also protect the reservist if injured while traveling to and from ADT-OTD, and provide an authorized absence from the civilian workplace.

Reservists shall not report without orders. If orders are not received within two weeks of the desired ADT-OTD start date, reservists shall contact their unit yeoman.

Orders will not be retroactively issued.

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<b>Requesting ADT-OTD Orders</b>	Reservists requesting orders should refer to the ADT-AT request process.
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<b>ADT-OTD Chain of Responsibility</b>	ADT-OTD and ADT-AT requests are processed the same way. Refer to the ADT-AT section for guidance.
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## **Active Duty for Training-Other Training Duty (ADT-OTD) (Continued)**

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<b>Non-Consecutive ADT-OTD</b>	<p>ADT-OTD is usually performed on consecutive calendar days. In rare instances, members may be approved for non-consecutive ADT-OTD.</p> <p>With the release of Direct Access members are required to request orders for separate periods of active duty.</p> <p>Current policy dictates that non-consecutive orders are not authorized for the convenience of the member. Commands determine the nature of the training duty is best accomplished in small increments. Non-consecutive orders are used for members who live near their unit, thereby eliminating the need for additional travel or lodging costs.</p> <p>Each set of non-consecutive orders will be issued a new Travel Order Number (TONO). The span of non-consecutive orders is no longer limited to 90 days. If travel allowances are authorized, the member will be paid once per set of orders.</p>
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Requests are processed in the same manner as consecutive ADT-OTD and ADT-AT.

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**Non-Paid ADT-OTD** Non-paid active duty is always voluntary. Active duty without pay accrues retirement points the same as active duty with pay.

Per diem is not normally authorized for reservists performing active duty without pay. Units may authorize and fund per diem for reservists not working for pay while they are in a travel status.

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**Cancellation of Orders** Commands needing to terminate or amend a member's orders shall notify the ISC (pf) immediately.

For cancellation requests, orders shall be returned to the issuing authority with a written explanation. The servicing SPO shall notify the ISC (pf) via e-mail of the cancellation.

After the ISC (pf) receives notice of a cancellation, funds will be reallocated to other personnel.

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## **Active Duty for Training-Other Training Duty (ADT-OTD) (Continued)**

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**References** Reserve Policy Manual, COMDTINST M1001.28A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A

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**Additional Information** U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Training Quota Management Center:  
<http://www.uscg.mil/hq/tqc/index.htm>  
Pay Charts: <http://www.uscg.mil/hq/psc/>  
Active Duty Allowances: <http://www.dtic.mil/perdiem/rateinfo.html>  
Direct Access: <http://www.uscg.mil/hq/psc/cghrms/>

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## Active Duty Other than for Training (ADOT)

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### General Information

Active Duty Other than for Training (ADOT) is a tour of active duty used to provide reserve support to either active or reserve component missions.

The types of ADOT are:

- (1) Active Duty Special Work
  - (2) Extended Active Duty
  - (3) Involuntary Active Duty
  - (4) Reserve Program Administrator
  - (5) Active Duty for Health Care
- 

### Active Duty Special Work (ADSW)

Active Duty Special Work (ADSW) in support of the Active Component (ADSW-AC) or the Reserve Component (ADSW-RC) is voluntary active duty authorized to sustain active or reserve programs. The purpose of ADSW is to temporarily support existing or emerging service requirements.

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<b>Extended Active Duty</b>	Extended Active Duty (EAD) is voluntary active duty for reservists serving in an active duty component status. It is used to provide support or fill occasional personnel shortages in specific billets when active duty Coast Guard resources do not meet requirements.
<b>Involuntary Active Duty</b>	Involuntary Active Duty is used to support military operations when the President or the Congress determines reserve forces are required to supplement active duty forces. It is also used by the Secretary of Homeland Security to provide domestic security and respond to homeland emergencies. Involuntary Active Duty is often called Title 10 or Title 14, which refers to the governing U. S. Code.
<b>Reserve Program Administrator (RPA) Duty</b>	The Reserve Program Administrator (RPA) is a specific EAD contract with an option to remain on active duty upon contract completion. RPAs manage the USCGR program and serve as field-level human resource professionals.

### Active Duty Other than for Training (ADOT) (Continued)

<b>Reserve Program Administrator (RPA) Duty (continued)</b>	<p>Reserve Program Administrators are Reserve officers on extended active duty to organize, administer, recruit, instruct, or train members of the Reserve component.</p> <p>Reserve and active duty officers may apply for RPA duty. Retired officers are not eligible. All selected officers will be initially designated as provisional RPAs. Upon receiving permanent status, members receive indefinite orders to active duty and serve as full time, active duty officers until separation.</p> <p>Solicitations are posted on the Coast Guard Message System and subsequently posted on the Reserve Message Traffic web page. The messages outline the application process and service requirements.</p> <p>The Coast Guard Personnel Command-Officer Personnel Management Division (CGPC-opm) authorizes RPA orders.</p>
<b>Active Duty for Health Care</b>	Active Duty for Health Care (ADHC) is special voluntary active duty for members requiring long term medical care or health evaluation. It

**(ADHC)**

is not a supplement to, or extension of, any active duty service and should not be confused with demobilization-related medical holds or other orders for 31 days or more as addressed by U. S. Code.

A reservist who incurs or aggravates an injury, illness, or disease in the line of duty, or while traveling to or from the place at which that member is to perform or has performed duty, may be entitled to ADHC benefits.

ADHC is applicable to reservists working and traveling under the following types of orders:

- (1) Active duty for a period of less than 30 days
- (2) Inactive Duty Training (IDT) drills
- (3) Service on funeral honors duty

A member is not entitled to military health benefits when the injury, illness, or disease is the direct result of the member's misconduct or gross negligence.

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## **Active Duty Other than for Training (ADOT) (Continued)**

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**Active Duty for  
Health Care  
(ADHC) (continued)**

Members eligible for ADHC receive the medical or dental care appropriate for the treatment of the injury, illness, or disease until the resulting disability cannot be materially improved by further hospitalization or treatment.

If a member opts not to be retained on active duty for the duration of recovery, they are entitled to receive military medical treatment via a Notice of Eligibility (NOE). The NOE may also allow the injured reservist to receive incapacitation pay. The amount awarded shall be the lesser of the lost civilian income or estimated Coast Guard pay as though the member was on active duty.

Commands should complete an NOE in accordance with the Reserve Policy Manual.

Commands shall notify the Coast Guard Personnel Command's Reserve Personnel Management Division (CGPC-rpm) and the servicing ISC (pf) when a reservist needs to be or is placed in an ADHC status.

CGPC-rpm authorizes ADHC orders.

When declared Fit For Full Duty (FFFD) and released from ADHC, commands shall notify CGPC-rpm and the servicing ISC (pf).

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**References**

Coast Guard Personnel Manual, COMDTINST M1000.6A  
 Reserve Policy Manual, COMDTINST M1001.28A  
 Personnel and Pay Procedures Manual, PSCINST M1000.2A  
 10 USC 1074a, 12301, 12322

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**Additional Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
 CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>  
 Reserve Policy and Programs:  
<http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm>  
 RPA Information: <http://www.uscg.mil/reserve/rpa/rpahome.htm>  
 U. S. Code: <http://assembler.law.cornell.edu/uscode/>

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## Active Duty Special Work (ADSW)

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**General Information**

Active Duty Special Work (ADSW) is a tour of voluntary active duty other than Extended Active Duty (EAD). The purpose of ADSW is to provide necessary, skilled reservists to temporarily support existing or emerging requirements.

Short-term ADSW is duty performed consecutively for 139 days or less. Long-term ADSW is duty performed consecutively in excess of 139 days.

There are two types of ASDW:

- (1) ASDW-AC (in support of the Active Component)
- (2) ASDW-RC (in support of the Reserve Component)

ISC (pf) approves all reserve orders, including ADSW-AC orders.

Members working under ADSW orders greater than 30 days in length must obtain an active duty identification card.

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**Active Duty Special Work in Support of**

Active Duty Special Work in support of the Active Component (ADSW-AC) is active duty, other than EAD, performed by a reservist

<b>the Active Component (ADSW-AC)</b>	<p>in support of the Active Component.</p> <p>ADSW-AC is voluntary active duty and may be used to bring personnel onboard during a national emergency.</p> <p>ADSW-AC is funded and controlled by the active duty command bringing the member on active duty. The regional ISC (pf) is not responsible for any funding or accounting strings. All costs, including pay and benefits, travel and per diem, and Permanent Change of Station (PCS) entitlements, when applicable, are the responsibility of the commands using ASDW-AC.</p> <p>Reserve personnel on ADSW-AC do not fill an active duty billet.</p>
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<b>Active Duty Special Work in Support of the Reserve Component (ADSW-RC)</b>	<p>Active Duty Special Work in support of the Reserve Component (ADSW-RC) is active duty, other than EAD, performed by a reservist in direct support of the Reserve Component.</p>
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## Active Duty Special Work (ADSW) (Continued)

<b>Active Duty Special Work in Support of the Reserve Component (ADSW-RC) (continued)</b>	<p>ADSW-RC orders for 60 days or less are authorized by the servicing ISC (pf). ADSW-RC orders exceeding 60 days are authorized by the Office of Reserve Affairs-Reserve Funds Management Division (G-WTR-3) and processed by the servicing ISC (pf).</p> <p>Reservists shall not perform more than 60 days of ADSW-RC in a fiscal year without receiving prior approval from G-WTR-3.</p> <p>ADSW-RC is funded and controlled by the Reserve program. All costs, including pay and benefits, travel and per diem, and PCS entitlements, when applicable, are the responsibility of the ISC (pf).</p> <p>Reserve personnel on ADSW-RC do not fill an active duty billet.</p>
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<b>Request Regulations</b>	<p>Members of the Select Reserves (SELRES) and Inactive Ready Reserve (IRR) may apply for ADSW positions.</p> <p>Reservists with 16 or more years of combined active service are not eligible for ADSW contracts without the authorization of G-W. If, upon completion of a contract, a member will exceed 16 years total</p>
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active service, G-WTR must approve the request.

ADSW vacancies are posted on the Coast Guard Message System and subsequently posted on the Reserve internet web page <http://www.uscg.mil/hq/reserve/reshmpg.html> or intranet web page <http://cgweb.uscg.mil/g-w/reserve>. There is no season for announcements; contracts are needs-based and are posted year-round. The web page lists opportunities for both officers and enlisted personnel.

Commands shall ensure reservists meet readiness standards prior to approving order requests. Reservists shall not be issued orders to perform active duty unless they are in a Fit For Full Duty (FFFD) status have a completed Annual Screening Questionnaire (ASQ) on file. ISC (pf) may authorize a Readiness Management Period (RMP) for medical exams prior to the start of active duty. No orders will be approved until the ISC (pf) has received an FFFD notice.

Orders cannot exceed 365 days and cannot cross fiscal years. Members whose assignments cross into the next fiscal year will be issued another set of orders starting 01 October.

## Active Duty Special Work (ADSW) (Continued)

### ADSW Application Guidelines

ADSW requests are processed in a similar manner as Active Duty for Training-Annual Training (ADT-AT) requests. Members seeking ADSW orders may start the application process by using Direct Access (DA).

Refer to the ADT-AT section for application process guidance.

The only change to the outlined ADT-AT process applies to ADSW-AC requests. For duty normally funded through Reserve program funds, (ADSW-RC, ADT), the servicing ISC (pf) will assign a Travel Order Number (TONO) and accounting strings for pay, allowances, and any applicable travel or per diem entitlements. The unit sponsoring the member funds ADSW-AC orders, not the ISC (pf). The unit entering the request must enter the TONO and accounting string(s) and route to the servicing ISC (pf) for approval.

### Benefits and Entitlements

Members on long-term (greater than 139 days) ADSW are entitled to Permanent Change of Station (PCS) benefits.

ADSW benefits include Basic Allowance for Housing (BAH), Basic Allowance for Subsistence (BAS), per diem (if unit is greater than 50 miles from member's residence or assignment is outside permanent duty station), Cost of Living Allowance (COLA), and Family Separation Allowance (FSA). FSA only granted if ADSW period is greater than 30 days.

ADSW may satisfy the reserve ADT-AT requirement, if the assignment correlates to the member's RPAL billet. The servicing ISC (pf) makes this determination.

Members of the SELRES released from ADSW are responsible for their annual Inactive Duty Training (IDT) drills, though they are not required to complete 48 IDT drills. The active duty service overrides the monthly IDT drill requirements. For example, if a member is on active duty for two months, they are not required to make up the weekend drills missed during the active duty period. The eight skipped drills do not need to be rescheduled; the reservist's annual drill obligation is lowered to 40. Excused drills may be made up, but reservists coming off of active duty are not obligated to do so.

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## Active Duty Special Work (ADSW) (Continued)

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### References

Reserve Policy Manual, COMDTINST M1001.28A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A

### Additional Information

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
Active Duty Allowances: <http://www.dtic.mil/perdiem/rateinfo.html>  
Reserve Policy and Programs:  
<http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm>  
Pay Charts: <http://www.uscg.mil/hq/psc/>  
PSC Topeka: <http://www.uscg.mil/HQ/PSC/>

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## Extended Active Duty (EAD)

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### General Information

Extended Active Duty (EAD) is active duty for reservists serving in an Active Duty Personnel Allowance List (PAL) billet. It is used to provide support or fill occasional personnel shortages in specific pay grades, ratings, or specialties when active duty Coast Guard resources fall short of requirements.

Commands shall ensure reservists meet readiness standards prior to requesting orders. Reservists shall not be issued orders to perform active duty unless they are in a Fit For Full Duty (FFFD) status have a completed Annual Screening Questionnaire (ASQ) on file. ISC (pf) may authorize a Readiness Management Period (RMP) for medical exams prior to the start of active duty. No orders will be approved until the ISC (pf) has received an FFFD notice.

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### Contracts

An EAD contract is usually a two-year service agreement, though contracts can be issued up to four years. One-year contracts do exist, but are rare. Most active duty opportunities for reservists less than two years in duration are Active Duty Special Work (ADSW) contracts.

Submitting an EAD application does not obligate the member to accept a contract.

After completion of EAD, members are entitled to a paid SELRES

assignment.

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**Vacancy  
Announcements**

EAD vacancies are often announced in the beginning of the fiscal year.

EAD vacancies are posted on the Coast Guard Message System and subsequently posted on the Reserve Message Traffic web page.

The web page lists opportunities for both offices and enlisted personnel, though the application process differs for each.

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**Retirees**

Retired reserve officers may apply for EAD contracts. The application process for retired reserve officers differs from the Selected Reserve (SELRES) application process. Refer to the “Retired Officer Chain of Responsibility” section for details.

EAD contracts are not awarded to enlisted retirees.

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**Extended Active Duty (EAD) (Continued)**

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**Integration**

Officers and enlisted personnel working under EAD orders may have the option of being integrated during their active duty time. This depends on the needs of the Coast Guard.

If integrated, the member is considered part of the active duty component and follows the active service Officer Evaluation Report (OER) or enlisted evaluation submission schedule. Officers recalled to active duty from a retired status are not required to submit an OER and are not eligible for integration or promotion.

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**Benefits and  
Entitlements**

Reservists accepting contracts are considered active duty members and receive all housing, health, moving, and life insurance benefits entitled to active duty members.

Reservists earn one retirement point per day of active duty.

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**Enlisted Chain of  
Responsibility**

The supervising authority of the enlisted EAD program is the Coast Guard Personnel Command-Enlisted Personnel Management Division (CGPC-epm).

Member:

- (1) Fill out Request for Extended Active Duty (CG-3472)
- (2) Submit request to command for endorsement

Command:

- (1) Endorse request for EAD
- (2) Send request to unit admin

Unit Admin:

- (1) Within 5 days of receiving CG-3472, submit request to servicing ISC (pf)
- (2) Send copies to servicing Personnel Reporting Unit (SPO)

ISC (pf):

- (1) Determine if enough reserve resources are available to allow the member to be placed on active duty
- (2) If approved, fax endorsed requests to CGPC-epm
- (3) For members not recommended by ISC (pf), forward request to CGPC-epm with a negative endorsement.

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## Extended Active Duty (EAD) (Continued)

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**Enlisted Chain of  
Responsibility  
(continued)**

CGPC-epm:

- (1) Review reservist's personnel record
- (2) Notify unit of decision
- (3) Send Active Duty Agreement and Statement of Understanding on Montgomery G. I. Benefits (MGIB) to member's command
- (4) Send Permanent Change of Station (PCS) orders to the servicing SPO
- (5) Notify ISC (pf)

SPO:

- (1) Via DA, member is automatically removed from the Reserve Personnel Allowance List (RPAL) for the duration of the assignment (this billet is now considered open and available to be filled by another reserve member)

Command:

- (1) Notify member of EAD decision
  - (2) If member has been selected, execute MGIB paperwork
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**Officer Chain of Responsibility**

The supervising authority for the officer EAD program is the Coast Guard Personnel Command-Officer Personnel Management Division (CGPC-opm).

The solicitation for officers under EAD contracts differs from the enlisted EAD solicitation. Roughly twice a year, postings are made announcing jobs open to officers interested in EAD contracts. Rather than listing billets by specific rating and paygrade, the officer solicitation messages advertise only general criteria such as time in service (generally less than 11 years) or maximum rank desired.

Member:

- (1) Write letter indicating interest, being sure to specify the desired location and length of contract
- (2) Include a civilian resume outlining qualifications and experiences and a Reserve Officer Personal Résumé (CG-5481)
- (3) Submit request to command as soon as possible for endorsement

Command:

- (1) Endorse request for EAD
- (2) Send request to unit admin

## Extended Active Duty (EAD) (Continued)

**Officer Chain of Responsibility (continued)**

Unit Admin:

- (1) Within 5 days of receiving EAD request, submit paperwork to CGPC-opm
- (2) Send copies to servicing Personnel Reporting Unit (SPO) and ISC (pf)

ISC (pf):

- (1) Determine if enough reserve resources are available to allow the member to be placed on active duty
- (2) If approved, fax endorsed requests to CGPC-opm
- (3) For members not recommended by ISC (pf), forward request to CGPC-opm with a negative endorsement.

CGPC-opm:

- (1) Review the reservist's personnel record
- (2) Notify unit of decision
- (3) Send Active Duty Agreement and Statement of Understanding on Montgomery G.I. Benefits (MGIB) to member's command
- (4) Send Permanent Change of Station (PCS) orders to the servicing

SPO  
(5) Notify ISC (pf)

SPO:

- (1) Remove member from the Reserve Personnel Allowance List (RPAL) for the duration of the assignment (this billet is now considered open and available to be filled by another reserve member)

Command:

- (1) Notify member of EAD decision
- (2) If member has been selected, execute MGIB paperwork

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**Retired Officer  
Chain of  
Responsibility**

The supervising authority for the officer EAD program is the Coast Guard Personnel Command-Officer Personnel Management Division (CGPC-opm).

Member:

- (1) Write a letter indicating interest, including the duration of the recall agreement desired, the preferred commencement dates, desired unit or geographic area, and any pertinent qualifications and experience

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**Extended Active Duty (EAD) (Continued)**

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**Retired Officer  
Chain of  
Responsibility  
(continued)**

- (2) Requests should specifically address “retired recall,” “recall from retirement” or “resumption of retirement” as appropriate. Terms “extended active duty” or “release from active duty” are only used when dealing with non-retired reserve officers brought on active duty
- (3) Submit letter directly to CGPC-opm if already retired (constitutes consent to recall)
- (4) If on active duty pending retirement, submit request to command as soon as possible for endorsement

Command:

- (1) Endorse request. Endorsement should provide a specific recommendation addressing the best needs of the Coast Guard and how the officer’s recall will meet Coast Guard needs.
- (2) Forward to unit admin

Unit Admin:

- (1) Send letter to CGPC-opm

- (2) Send copies to servicing Personnel Reporting Unit (SPO) and ISC (pf)

The application letters are processed in the same manner as regular reserve EAD requests.

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**Contacts**

The enlisted EAD liaison at CGPC-epm can be reached at (202) 493-1243 for questions that cannot be answered at the command level.

The EAD liaison for officers at CGPC-opm can be reached at (202) 493-1620 for questions that cannot be answered at the command level.

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## **Extended Active Duty (EAD) (Continued)**

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Recall of Enlisted Reservists to Extended Active Duty, COMDTINST 1141.3A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Coast Guard Recruiting Manual, COMDTINST M1100.2D

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
Coast Guard Personnel Command:  
<http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm>  
Pay Charts: <http://www.uscg.mil/hq/psc/>  
Active Duty Allowances: <http://www.dtic.mil/perdiem/rateinfo.html>  
PSC Topeka: <http://www.uscg.mil/HQ/PSC/>

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## Chapter 2 – Mobilization and Accession

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## Obtaining Personnel to Meet Surge Requirements

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### **General Information**

Due to personnel shortages or surges in operations, commands often require short-term personnel in order to complete their missions.

Reservists on Active Duty Special Work in Support of the Active Component (ADSW-AC) or Active Duty for Training-Annual Training (ADT-AT) and active duty members on Temporary Duty (TDY) may fill shortages.

These short-term vacancies are open due to temporary emergency contingency operations or routine seasonal or special events.

Active duty TDY short-term assignments are less than 180 days, while long-term assignments are 180 days or longer. Long-term assignments for active duty personnel require a Permanent Change of Station (PCS).

Reservists on active duty orders written for greater than 139 days are entitled to PCS benefits.

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### **Short-Term Duty Coordination**

Each ISC (pf) is responsible for coordinating Reserve support requests, including requests on behalf of reservists located outside the district's Area of Responsibility (AOR) seeking employment in the ISC (pf)s AOR.

The number of required reservists and the funding sources are determined before solicitation notices are released.

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### **Assignment Designation and Responsibilities**

Short-term personnel support and requirements are broken down into two categories:

- (1) Mission Critical
- (2) Non-Mission Critical

Mission-critical requirements include personnel shortages that if left unfilled would have a significant impact and will not allow a unit to complete its primary mission. The servicing ISC (pf) works with operational program managers to coordinate funding for critical need personnel support.

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## Obtaining Personnel to Meet Surge Requirements (Continued)

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### **Assignment Designation and Responsibilities (continued)**

Non-mission critical requirements include personnel shortages that if left unfilled would have an impact, though would allow the unit to complete its primary missions with minor interruption. The requesting unit funds any non-critical need personnel support.

Commanding officers, District planning staff, and ISC (pf) personnel work together to minimize personnel shortages through effective personnel management. When directed, commanding officers are required to provide personnel in support of Area surge requirements. The operational commander or program manager is responsible for determining if a personnel need is critical or non-critical. This decision is supported by the recommendations of the Maintenance and Logistics Command (MLC) and the servicing ISC (pf).

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### **Reserve Volunteers**

Reservists are identified by their qualifications and may be voluntarily utilized to fill contingency or surge requirements.

Involuntary recall or voluntary active duty may be utilized for surge requirements caused by serious natural or man-made catastrophes such as hurricanes, floods, or other events that significantly impact operations. This may involve recall of reservists under voluntary or involuntary authority.

Reservists assigned to the Individual Ready Reserve (IRR) shall be given equal opportunity for rate-related ADSW-AC assignments when members are as qualified as reservists in an active drilling status.

Units may employ reservists on a voluntary basis under ADSW-AC orders.

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### **Requesting Short- Term Personnel Support**

MLC or unit commanders who anticipate contingency or operational surges, or other short-term requirements requiring additional personnel, may start the short-term staffing process.

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## Obtaining Personnel to Meet Surge Requirements (Continued)

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### **Requesting Short-Term Personnel Support (continued)**

#### Unit Commander/MLC:

- (1) Identify personnel shortage or surge requirement and specific qualifications required
- (2) Submit message (via e-mail or Coast Guard Message System) to ISC (pf) and Program Manager at least four weeks prior to the requested reporting date (provide documentation for emergency requests)
- (3) Requests shall include:
  - (a) Nature of requirement
  - (b) Reason for solicitation
  - (c) Preferred rank or rate
  - (d) Period and location of augmentation
  - (e) Special requirements or qualifications desired
  - (f) For shortages, include reason for vacancies and unit's total allowances for requested rating
  - (g) For surges, include justification for additional personnel
  - (h) Gender limitations (if applicable)
  - (i) Number of personnel on board (if applicable)
  - (j) Funding availability
  - (k) Unit point of contact and applicable information

#### ISC (pf):

- (1) Review request
- (2) Evaluate and make recommendation to program manager concerning mission critical or non-critical designation
- (3) If necessary, receive critical need tasking from MLC (pf)
- (4) Distribute solicitation; include deadline for responses

#### Members:

- (1) Read voluntary solicitation message
  - (2) If interested in position, obtain command approval
  - (3) Contact ISC (pf) before deadline
  - (4) Apply per message instructions
-

## Obtaining Personnel to Meet Surge Requirements (Continued)

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### **Requesting Short-Term Personnel Support (continued)**

#### ISC (pf):

- (1) Review pool of qualified applicants
- (2) Select member for assignment
- (3) If no applicants, and billet is mission-critical, issue select-and-direct orders
- (4) Notify tasked unit's program manager
- (5) Start order process via Direct Access (DA)
- (6) If volunteer not found for non-critical need, notify requesting unit after deadline has passed
- (7) If volunteer not found for critical need, contact MLC (pf); begin select-and-direct assignment process with Area and District units

#### Providing Unit:

- (1) Complete DA administrative duties for member
- (2) Issue orders to member

#### ISC (pf):

- (1) Track all support requested and provided
- (2) Distribute quarterly and annual reports to MLC (pf)

#### Member:

- (1) Report to duty station as ordered
- 

### **Reserve Availability Pool and Short-Term Staffing Registration List**

Solicitation notices for specific TDY/ADSW-AC opportunities are posted on the Coast Guard Message System and subsequently on Reserve web site. Members must initiate requests through their chain of command and servicing ISC (pf) when applicable.

In addition to posting messages on an as-needed basis, the Coast Guard maintains an online pool of volunteers interested in short-term assignments. Members may post requests for short-term assignments on the Reserve internet website, <http://www.uscg.mil/hq/reserve/reshmpg.html> or intranet website, <http://cgweb.uscg.mil/g-w/reserve>. Active duty and reserve personnel may apply for potential temporary assignment list.

Members who do not have internet access, or access to a Coast Guard Workstation, may sign up for the short-term staffing list. Members should contact their supervisors for assistance.

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## Obtaining Personnel to Meet Surge Requirements (Continued)

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### **Reserve Availability Pool and Short-Term Staffing Registration List (continued)**

Unit approval is not required to sign up on the registration list. If an applicant is interested in a specific assignment, the applicant needs command approval to be considered for the short-term assignment.

This is a registration process only. If selected for potential assignments, MLC personnel shall contact members to determine if registrants are still interested in TDY or ADSW-AC assignments.

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### **Critical and Non-Critical Vacancies**

If volunteers are not identified to fill critical personnel needs, MLCs shall recommend support options for Area units. MLC (pf) shall normally task a specific ISC (pf) to fill critical vacancies for Area missions. Each ISC (pf) shall do the same for District units. Non-critical personnel needs may be solicited via the ISC (pf), but if volunteers are not identified the positions will not be filled.

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Obtaining Personnel Resources To Meet Surge Requirements, COMDTINST 5400.1  
Coast Guard Manpower Mobilization and Support Plan, COMDTINST M3061.1

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### **Additional Information**

U.S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Reserve Message Traffic: <http://www.uscg.mil/reserve/msg04.htm>  
Short-Term Staffing Registration:  
<http://www.uscg.mil/hq/reserve/respool/respool.htm>  
Reserve Availability Pool: <http://cgweb.uscg.mil/g-w/reserve/respool/respool.htm>

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## Mobilization

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### General Information

The servicing ISC (pf) or Maintenance and Logistics Command (MLC) authorizes involuntary recall orders once the Commandant has delegated Presidential, Congressional, or Secretarial authority to the appropriate operational commander or commanders.

The involuntary recall of reservists for mobilization under Title 10 orders is limited to no more than 24 cumulative months. Title 14 involuntary recall is limited to no more than 30 days per four-month period or 60 days per two-year period.

A mobilized member's orders may be extended by the servicing ISC (pf). If a reservist's Title 10 orders are extended, the expected active duty termination date is amended and the member continues serving the active component.

Voluntary authority will not normally be used simultaneously with involuntary authority for the same emergency. Once involuntary authority has been granted for a specific emergency, reservists should be ordered to active duty under the involuntary authority.

Reservists may not perform any Inactive Duty Training (IDT) or other types of drill while in a mobilized status.

Mobilization is unaccompanied duty; reservists cannot bring dependents or household goods.

Refer to the Extended Active Duty (EAD), Active Duty Special Work (ADSW), and Retired Recall sections for information on voluntary mobilization.

---

### Mobilization

Mobilization is the process by which all or portions of the Armed Forces are brought to a state of readiness for war or a national emergency. It involves Reserve components ordered to active duty under a declaration of national emergency by the President or Congress, or when Congress declares war. It includes the orders to active duty of all or part of the Reserves, as well as assembling and organizing personnel, supplies, and material.

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## Mobilization (Continued)

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### **Mobilization (continued)**

Mobilization of the Armed Forces includes, but is not limited to, the following categories:

- (1) Selective Mobilization
  - (2) Partial Mobilization
  - (3) Full Mobilization
  - (4) Total Mobilization
- 

### **Contingency Clause**

Orders issued in conjunction with mobilization shall specifically state the member is on active duty in support of a contingency operation.

A contingency is a natural or man-made emergency that threatens the safety of lives, property, or the environment, threatens a national security interest, or may negatively impact the nation's well being. Some contingencies will result in increased Coast Guard responsibilities and/or operational workload, which may exceed the service resources normally available to an operational occurrence, predictability, duration, and effect.

The Coast Guard becomes involved in a contingency if it affects mission areas. In some cases, the contingency may not occur in the immediate area of responsibility, yet due to the unique nature of the service, may be requested to provide assistance. The magnitude of Coast Guard involvement and the degree to which it impacts other operations are the primary factors considered in making a decision to recall reservists.

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### **General Considerations**

In addition to matching skill sets to force requirements, the servicing ISC (pf) and unit commanding officers must consider the following:

- (1) Years of Service
- (2) Age of the Reservist
- (3) Priority for Recall

Years of Service: Special care must be taken to recognize the total years of service that potentially recalled members will have at the time that an operation is completed. According to 10 USC 12686, if at the time the contingency is completed, the member is within two years of becoming eligible for retired pay, the member must be allowed to stay on active duty, if the member so desires.

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## Mobilization (Continued)

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### General Considerations (continued)

Age of the Reservist: Reservists (and retirees under the considerations of full mobilization) may be recalled until they reach age 60. When selecting a member for activation, a member's age should be noted to ensure that the member will not reach age 60 before the end of the expected duration of the contingency.

Priority for Recall: Selected Reservists have the highest priority for involuntary recall, followed in decreasing priority by IRR personnel, Standby Reservists (not excused prior to mobilization by reason of critical occupation or personal/community hardship), and non-disability retirees.

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### Medical and Dental Readiness

Commands shall ensure reservists meet participation standards prior to mobilization. Reservists shall not be issued orders to perform active duty unless they are in a Fit For Full Duty (FFFD) status and have current physical and dental exams on file. ISC (pf) may authorize a Readiness Management Period (RMP) for medical exams prior to the start of active duty. No orders will be approved until the ISC (pf) has received an FFFD notice. Members who fail to maintain medical and/or dental readiness standards shall be processed in accordance with chapter 4.B of the RPM.

---

### Selective Mobilization

Selective mobilization is the expansion of the active Armed Forces by action of Congress and/or the President to order reservists to active duty, members of the Individual Ready Reserve (IRR), and the resources needed for their support, to meet the requirements of a domestic emergency (postal strike, flood, earthquake, etc.). It does not involve a threat to national security.

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### Partial Mobilization

The President orders partial mobilization under 10 USC 12302. Recall cannot be for more than one million Ready Reservists and not longer than 24 months.

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### Full Mobilization

Under 10 USC 12301, full mobilization is authorized in time or war or national emergency declared by Congress of all Reserve component units in the existing force structures, all individual, standby, and retired reservists, retired active duty personnel, and the resources needed for their support. Full mobilization is directed by Congress in situations requiring the expansion of the active forces to meet the requirements of a war or other national emergency involving an external threat to

national security.

## Mobilization (Continued)

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<b>Full Mobilization (continued)</b>	Units, individual reservists, and retirees may be ordered to active duty for the duration of the emergency, plus six months thereafter.
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<b>Total Mobilization</b>	Total mobilization is the expansion of the active armed forces resulting from action by Congress and the President to organize and/or generate additional units or personnel, beyond the existing force structure, and the resources needed for their support to meet the total requirement of a war or other national emergency involving an external threat to the national security.
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<b>Authority for Recall and Mobilization</b>	<p><u>Selective Mobilization</u>: The following authorities may be used to support domestic emergencies:</p> <ol style="list-style-type: none"> <li>(1) <u>Involuntary Active Duty for Domestic Emergencies</u>: Authority for recall is established under 14 USC 712. A domestic emergency is defined as a serious natural or man-made disaster, accident, or catastrophe. The Secretary of Homeland Security may, subject to the approval of the President and without the consent of the member, order to active duty member of the Ready Reserve for not more than 30 days on any 4-month period, and not more than 60 days in 24 months.</li> <li>(2) <u>Voluntary Active Duty for Emergency Augmentation of Active Forces</u>: Authority for recall is established under 10 USC 12301 (d). An authority designated by the Secretary of Homeland Security may order any reservists to active duty with the consent of the member. District commanders are delegated with the authority to recall reservists to active duty (other than for training) with their consent. No more than 10 officers and 100 enlisted members may be on active duty for more than 30 days.</li> </ol> <p><u>Partial Mobilization</u>: Authority for recall is established under 10 USC 12302. Following a declaration of national emergency by the President, up to 1 million members of the Ready Reserve may be recalled without their consent for not more than 24 months.</p> <p><u>Full Mobilization</u>: Authority for recall is established under 10 USC 12301. Members of the Ready Reserve may be called to active duty without their consent in time of war or national emergency declared by Congress for the duration of the emergency or war and for a period of up to six months thereafter.</p>
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## Mobilization (Continued)

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### Authority for Recall and Mobilization (continued)

Involuntary Active Duty for Military Operations: Authority for recall is established under 10 USC 12304. It empowers the President, without a declaration of national emergency, to authorize the Secretary of Defense and the Secretary of Homeland Security to order to active duty, up to 200,000 members of the Selected Reserve. The Coast Guard's apportionment is coordinated with services by the Joint Chiefs of Staff (JCS) according to contingency requirements. Periods of active duty can be no longer than 270 days. The type of recall is commonly referred to as "Presidential Selective Reserve Call-Up" (PSRC). It is prohibited to mobilize reservists to respond to domestic emergencies under PSRC authority.

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### Involuntary Recall Authorities

Ready Reserve: 10 USC 12301 and 12302, may be called under full or partial mobilization conditions as described. Ready Reservists may also be ordered for duty in domestic emergencies by the Secretary of Homeland Security under 14 USC 712.

Selected Reserve: Subject to all Ready Reserve call-up actions, plus 10 USC 12304 Presidential Selected Reserve Call-Up.

Standby Reserve: 10 USC 12306 (subject to conditions in 10 USC 12301, war or national emergency declared by Congress) only after the Secretary determined there are not enough qualified members in the Ready Reserve readily available.

Retried Reserve: 10 USC 12307 (subject to conditions in 10 USC 12301, war or national emergency declared by Congress) only after the Secretary determines there are not enough qualified members in the Ready Reserve in the required category readily available.

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## Mobilization (Continued)

Mobilization Authorities	Citation	Enabling Authority	In Response To	Type and Limitations
	14 USC 712	Secretary of Homeland Security	Serious natural or manmade disasters, accidents, or catastrophes	Involuntary; not more than 30 days per four-month period or 60 days per two-year period.
	10 USC 12301 (a)	Congress	War or National Emergency declared by Congress	Involuntary; duration of war or national emergency, plus six months
	10 USC 12301 (d)	Designated Authority	Any event or Extended Active Duty, Active Duty for Special Work, Retired recall, etc.	Voluntary; retain only with member consent
	10 USC 12302	President	National Emergency declared by the President	Involuntary; not more than 24 cumulative months
	10 USC 12304	President	Selected Reserve augmentation for any mission deemed necessary by the President	Involuntary; not more than 270 days

### Title 14

During a serious natural or man-made disaster, accident, or catastrophe, the Secretary of Homeland Security may order members of the Ready Reserve to active duty, without their consent, for emergency augmentation of regular Coast Guard forces.

This authority is limited by 14 USC 712 to not more than 30 days in any one 4-month period and for not more than 60 days in any 2-year period for each member ordered to active duty under this section.

### Actions Not Under Full Mobilization

Under partial, selective, or other mobilization besides full mobilization, members wait for specific orders before they report to their duty sites.

During the assessment and activation phase, commands shall notify members, generally by telephone, of their recall before orders are issued.

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## Mobilization (Continued)

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**Actions Not Under Full Mobilization (continued)**

At the time of notification, reservists will be provided with information on the nature of the recall, duration of the duty, and the reporting date, time, and site. This information should include enough details to allow reservists to properly prepare for the assignment.

Orders may be mailed, sent by overnight delivery, or faxed to the member. If faxed, the member shall receive a hard copy set of orders at the duty site.

---

**Actions Under Full Mobilization**

Should reservists hear that the United States or its territories has suffered an enemy attack, or the President or other authority orders full mobilization and communications are down, they should proceed immediately to their reporting site. Full mobilization differs from other types of mobilization in that members do not wait for additional instructions before heading to their mobilization site.

---

**Reporting Site**

In most cases, the reporting site will be a member's Inactive Duty for Training (IDT) unit. Depending on the situation, reporting personnel may be reassigned to a different duty station after reporting to their IDT site. Logistics specialists from Districts and Maintenance and Logistics Commands (MLC) will make the arrangements at that time.

The expected response time for reporting to a full mobilization is within 24-hours.

---

**Required Items**

Reservists must bring appropriate uniforms, any government equipment in their possession, their military identification card, driver license, two pairs of eyeglasses (if required) and sufficient personal funds. They should also bring documentation to record changes to dependent status in the Defense Enrollment Eligibility Reporting System (DEERS) as well as registration and proof of insurance if traveling by privately owned vehicle (POV).

---

**Full Mobilization**

Conditions requiring full mobilization are so exigent that no time would

**Orders** exist to use the alert call-up system before reservists are required at the duty sites.

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## **Mobilization (Continued)**

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**Full Mobilization Orders (continued)** No hard copy orders will be issued until feasible, usually after the member arrives for duty.

Legal authorities governing involuntary activations protect the employment of reservists recalled under emergency situations, even though the employer has not received an advance copy of the orders.

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**Mobilization Chain of Responsibility** Headquarters:

- (1) Authorize mobilization of reservists via ALCOAST

Units Needing Mobilization Resources:

- (1) Identify mobilization needs
- (2) Identify berthing and messing facilities on/near site
- (3) Contact servicing ISC (pf) and operational command (District or Area commanders)
- (4) Refer to the 9700/9800 OPLAN, Coast Guard Manpower Mobilization and Support Plan, and Chapter 11 of the Personnel and Pay Procedures Manual (PPPM), for specifics on mobilization coordination

Operational Command:

- (1) Direct ISC (pf) to supply mobilization resources

ISC (pf):

- (1) Coordinate with units to identify reservists

Member's Regularly Assigned Unit:

- (1) Identify members for recall
- (2) Notify member of pending mobilization
- (3) Cancel member's scheduled drills
- (4) Screen member for medical readiness and other readiness requirements
- (5) If member does not have a current physical on file, request a Readiness Management Period (RMP) from ISC (pf)
- (6) Schedule medical appointment with unit medical department and member (if necessary)
- (7) Arrange for transfer of medical file to mobilization unit (if

current physical on file)

ISC (pf):

- (1) If necessary, authorize RMP for physical examination

Member:

- (1) Receive physical examination

## **Mobilization (Continued)**

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### **Mobilization Chain of Responsibility (continued)**

Member's Regularly Assigned Unit:

- (1) If member Fit For Full Duty (FFFD), arrange transfer of medical file to mobilization unit
- (2) Start request for reserve orders mobilization process in Direct Access (DA)-input travel, per diem, and other allowances
- (3) Assist member with mobilization-related travel arrangements
- (4) Send letter to member's civilian employer notifying of recall

ISC (pf):

- (1) In DA, authorize request for mobilization orders
- (2) Generate Travel Order Number (TONO) and accounting strings

Member's Regularly Assigned Personnel Reporting Unit (SPO):

- (1) Prepare mobilization orders
- (2) Coordinate processing of travel advances
- (3) Forward Military Personnel Data Records (PDR) to SPO at mobilization site

Member:

- (1) Report for duty as ordered
- (2) Prepare Travel Voucher (DD-1351-2)
- (3) Update Servicemembers' Group Life Insurance (SGLI) beneficiaries and coverage
- (4) Submit forms to unit admin

Mobilization Unit:

- (1) Report member aboard for mobilization
  - (2) Verify date member reported, unit subsistence status, member's quarters, and member's dependent status
  - (3) Endorse orders
  - (4) Forward orders to SPO
  - (5) Arrange for member to receive active duty identification card
  - (6) Conduct appropriate security briefing
  - (7) Counsel member on available Work-Life resources
-

## Mobilization (Continued)

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### Mobilization Chain of Responsibility (continued)

Member:

- (1) Log on to DA
- (2) Home > Self Service > Employee > Tasks
- (3) Review and update Emergency Contacts, Home and Mailing Address, Phone Numbers, Direct Deposit, W-4 Tax Information, and State Tax Information sections
- (4) If internet is not accessible, contact servicing SPO for support

PSC:

- (1) Process travel claim and travel advances (if requested)

SPO:

- (1) Maintain pay and leave accounts during mobilization
- 

### Hardships

Waivers for involuntary call-up may be granted for several hardship situations, including members not available for recall due to:

- (1) Employment in a critical civilian industry or profession critical to national security objectives
- (2) Family hardship
- (3) Employment in key federal position

Members should document the extenuating circumstances preventing mobilization.

Members with a hardship may request release, separation, or discharge on humanitarian or other grounds under the same criteria applicable to active duty members. Special conditions apply during war or periods of national emergency. Refer to Department of Defense Directive 1200.7 and section 5.B.6.c of the Reserve Policy Manual for details.

---

### Deferments

Reservists with temporary hardships may request a deferment. Appropriate deferments include a temporary medical condition that makes the member unqualified for duty, or a temporary family situation or community hardship.

Deferments shall not be authorized for non-critical civilian employment, occupation or financial hardship, or for the purpose of exempting members from active duty. Most childcare situations, including being a single parent, would not justify a family deferment.

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## Mobilization (Continued)

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### **Critical Civilian Employment**

After reporting, members may claim hardship if they are employed in a critical civilian industry or profession. This is an occupation that could be critical to the community at the same time that a mobilization is necessary.

Critical civilian occupations include police officers, fire fighters, emergency medical technicians, and local government officials. Refer to Department of Defense Directive 1200.7 and section 5.B.6.c of the Reserve Policy Manual for details.

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### **Key Employees**

Key employees are federal employees occupying key positions that shall not be vacated during a national emergency or mobilization without seriously impairing the capability of the parent federal agency or officer to function effectively.

Key employees include the Vice President of the United States, members of Congress, heads of federal agencies, and Article III judges. Refer to Department of Defense Directive 1200.7 for details.

All employers who determine that a Ready Reservist is a key employee shall promptly submit such determination to CGPC-rpm requesting that the employee be removed from the Ready Reserve, using the guidelines in DoDD 1200.7, Screening the Ready Reserve. CGPC-rpm shall make removal determinations in response to petitions for such actions.

If CGPC-rpm determines that the member a key employee in public or private employment, the member is moved to the Active Status List, Standby Reserve.

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### **Reserve Personnel Allowance List (RPAL)**

Reserve personnel recalled to active duty under Title 10 or Title 14 orders lose their position number designation upon activation. As a result, the member's billet appears vacant on the Reserve Personnel Allowance List (RPAL).

Mobilized reservists maintain their position and the seemingly vacant billet is not available for assignment consideration. Upon demobilization, reservists normally return to their former positions. Members will be returned to their home unit and position (subject to availability).

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## Mobilization (Continued)

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### Enlistment Expiration

Reservists whose enlistments normally would have expired while they were involuntarily recalled to active duty, except that their enlistment was involuntarily extended, shall be expeditiously discharged or released from active duty as appropriate, unless they are qualified for and request re-enlistment. These members requesting to re-enlist shall be immediately re-enlisted to prevent a break in service.

---

### Legal Readiness

Before departing for a period of mobilization, a reservist should:

- (1) Obtain active duty military identification cards for spouse and dependents
- (2) Update Record of Emergency Data
- (3) Designate or update life insurance beneficiaries
- (4) Discuss and choose family medical and dental care options
- (5) Discuss home and deployment finances; create new budget
- (6) Discuss communications during family separation
- (7) Create or update will(s)
- (8) Consider designating a Power of Attorney
- (9) Designate legal guardians for children (if applicable)

Members should stow the following documents in a safe place:

- (1) Marriage license and certificate
- (2) Birth certificates (for self, spouse, dependents)
- (3) Copy of DEERS forms
- (4) Copies of family military-issued identification cards
- (5) Power of Attorney papers
- (6) Will(s)
- (7) List of immediate family members
- (8) Social Security Numbers of self, spouse, and dependents
- (9) Vital addresses and phone numbers
- (10) Copy of service records
- (11) Copies of family and pet medical and vaccination records
- (12) Tax records (5 years old to most recent tax year)
- (13) Real estate papers (deeds, titles, mortgages, rental agreements)

- (14) Savings bonds
  - (15) Banking Information (saving and checking account numbers, credit card accounts, securities, etc.)
  - (16) Insurance policies
  - (17) Inventory of household property
  - (18) Adoption papers
  - (19) Death certificates
  - (20) Divorce papers
  - (21) Citizenship/Naturalization papers
  - (22) Passports/Visas
- Proof of prior service

## **Mobilization (Continued)**

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### **Legal Protections**

All mobilization orders contain the following statement:

“If you have any question regarding your employment/reemployment rights, you may call 1-800-336-4590 (National Committee for Employer Support of the Guard and Reserve), check online at <http://www/esgr.org> or the CG Legal Fact Sheet about the Soldiers’ and Sailors’ Civil Relief Act (SSCRA) at [http://www.uscg.mil/legal/la/topics/sscra/about\\_the\\_sscra.htm](http://www.uscg.mil/legal/la/topics/sscra/about_the_sscra.htm).”

The SSCRA provides a wide range of protections for members on active duty. Legal protections begin on the date mobilization orders become effective and terminate within 60 to 90 days after the date of discharge from active duty.

The SSCRA provides/addresses:

- (1) Eviction and rent protection
- (2) Installment contracts
- (3) Reduced interest rates
- (4) Stay of proceedings
- (5) Default Judgments
- (6) Insurance protection
- (7) State tax protection
- (8) Adverse actions

A person called to active duty is also entitled to reinstatement of any health insurance in effect on the day before such service commenced and was terminated effective on the date during the period of such service.

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### **Civilian Employer Notification and Protections**

Service members are required to and responsible for giving civilian employers verbal or written notice prior to military service. Service members are strongly encouraged to provide their employers with

written advance notice to military service periods, 30 days in advance if possible. Upon reporting for active duty, commands frequently send employers a courtesy letter thanking them for their assistance.

Reemployment rights with a civilian employer are protected under Chapter 43 of Title 38, U. S. Code. The Uniformed Services Employment and Reemployment Rights Act (USERRA), provides a broad range of civilian job protections.

## Mobilization (Continued)

### **Civilian Employer Notification and Protections (continued)**

Reservists may be required to provide their civilian workplace a copy of orders when departing for military service.

Significant changes in military leave of absence management include:

- (1) An employee no longer requests permission to be absent for military leave but rather provides notification of pending military service
- (2) There is no longer any differentiation between voluntary and involuntary service
- (3) An employee cannot be required to use earned vacation or similar leave days for military leave of absence
- (4) Military service will not be counted as time away from the employer for retirement purposes (Federal employees should review the Code of Federal Regulations, series 5 CFR 353.201-210 for details related to their employment)

The Department of Labor is the enforcement authority for USERRA and it processes all formal complaints of violations of the law.

The National Committee for Employer Support of the Guard and Reserve (ESGR) maintains updated legal information for employers and reservists.

### **Benefits and Entitlements**

The mobilization orders issued by ISC (pf) drive travel and per diem entitlements. Pay entitlements depend on the legislative authority under which the orders are issued.

Reservists earn one retirement point per day of active duty.

Recalled reservists are entitled to temporary duty (TDY) travel entitlements. If government or contracted berthing and messing are not

available, members may be entitled to lodging plus per diem (meals and incidental expenses).

Per diem is not authorized when the member commutes between their legal residence and duty station, even if the residence lies outside the local reasonable commuting distance (50 miles or 90 minute one-way commute).

Mobilized members are not entitled to permanent change of station (PCS) benefits.

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## **Mobilization (Continued)**

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### **Benefits and Entitlements (continued)**

Reservists also earn Basic Allowance for Housing, Basic Allowance for Subsistence/Commuted Rations, and Cost of Living Allowance, (BAH, BAS/COMRATS, COLA) (if applicable) and enlisted members receive a uniform allowance while on active duty orders.

Reservists may be entitled to Family Separation Allowance (FSA). FSA compensates a member for the additional expenses incurred because of a family separation. After 30 days of family separation, members may fill out the Family Separation Allowance application (CG-PSC 2045) and submit the form to the servicing SPO.

FSA is payable in addition to any other allowance or per diem to which a member may be entitled.

If an enlisted member goes on active duty for more than 30 consecutive days, they are entitled to the active duty monthly clothing maintenance allowance.

Members recalled under 10 USC 12302 are entitled to special temporary household goods storage, including privately owned vehicles (POVs). Authority must be requested from the Office of Military Personnel-Compensation Division (G-WPM-2).

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### **Monthly Travel Claims**

Members on long-term mobilization orders (orders authorizing 139 days or longer of active duty) who are entitled to per diem, are to file a Travel Voucher (DD-1351-2) every 30 days to ensure payment of funds to cover rent and other monthly expenses.

For a travel claim to be properly processed each 30 days, it is necessary that the orders be designated at Blanket Temporary Duty (TDY) Orders (Document Type 13) and not Standard TDY Orders (Document Type

11) and submitted as a new claim each time.

Refer to the Personnel and Pay Procedures Manual, PSCINST M1000.2A, for guidance on filling out first, subsequent, and final long-term mobilization travel claims.

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## Mobilization (Continued)

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**Uniform Allowances** Officers do not receive monthly uniform allowances like enlisted personnel. Instead, reserve officers on active duty may be entitled to allowances, providing certain conditions are met. Officers who have not received an allowance in the past two years who have been on active duty for at least 90 days, or officers who recently graduated from Officer Candidate School (OCS) and are currently on active duty for a period in excess of 139 days are allowed to claim uniform allowances.

The Officer Uniform Allowance Claim Worksheet (CG-PSC-5100) outlines the entitlements for reserve officers. Completed forms should be submitted to the servicing SPO.

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**Earned Leave** Members are not entitled to lodging plus per diem (lodging, meals, and incidentals) on any day classified as leave. The only exception is for members who obtain lodging on a monthly basis.

Mobilized reservists who obtain lodging on a monthly basis and take short periods of leave may be reimbursed the monthly lodging charge. However, they are not entitled to meals and incidental expenses on leave days. The monthly lodging reimbursement (including utilities and maintenance) may not exceed the daily lodging per diem for the total days of per diem allowances.

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**Pay Issues** Units are required to validate a roster of mobilized members each month and report discrepancies to the SPO and ISC (pf) Assignment Officer.

Members must review their LES on a monthly basis and report any discrepancies via the chain of command. The member must report any instance where:

- (1) The LES shows a pay entitlement to which the member is not entitled
- (2) The member continues to be paid after being released from active duty

Reservists who are overpaid will be required to repay any overpayments, plus interest. The overpayments will be collected in lump sum from a member's final separation pay, and from future Active Duty for Training (ADT) or Inactive Duty Training (IDT) earnings to which the member is entitled after release from active duty.

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## **Mobilization (Continued)**

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### **State Taxes**

Some states do not tax military income from reservists on active duty outside their state of legal residence. Members must submit a state tax withholding form to their state of residence to claim exemption.

This exemption currently applies to residents of Arizona, California, Connecticut, Minnesota, Missouri, Montana, New Jersey, New York, Oregon, Pennsylvania, Vermont, and Puerto Rico.

Refer to your state's tax website for guidance.

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## **Health Care**

Reservists recalled to active duty for more than 30 consecutive days are eligible for TRICARE health insurance, the same as active duty service members. Families of these members are also eligible for TRICARE. To ensure dependents are eligible for such health coverage, sponsors should register their family in DEERS, the system used to verify eligibility for health care.

Mobilized reservists and their family members become eligible for TRICARE Standard and TRICARE Extra on the first day of the sponsor's orders if his/her orders are for more than 30 consecutive days or if the orders are for an indefinite period. They also become eligible for the pharmacy program, and may have prescriptions filled at a Military Treatment Facility (MTF) pharmacy, at retail pharmacies, or through the TRICARE Mail Order Pharmacy.

Members and their dependents are also eligible for dental treatment and coverage.

Reservists enrolled in TRICARE Dental, managed by United Concordia, for themselves and/or their families prior to mobilization are automatically converted to the lower active duty rate while in a mobilized status. During mobilization, recalled reservists are not covered under United Concordia and must re-enroll when released from active duty.

For more information on these programs contact your unit.

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## **Mobilization (Continued)**

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### **Identification Cards**

Members recalled to active duty for a period of more than 30 days receive active duty identification cards. Cards may be issued as soon as the orders become effective. The member does not have to wait until the 30<sup>th</sup> day of active duty to receive the active duty card.

Spouses and dependent children of recalled reservists are entitled to active duty identification cards for the duration of mobilization.

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### **Servicemembers' Group Life**

Servicemembers' Group Life Insurance (SGLI) is a program of low cost group life insurance for military members.

### **Insurance (SGLI)**

Coverage is automatically set up for members, but is not mandatory. Coverage is automatically increased to the maximum amount upon mobilization.

If the member does not desire continued maximum coverage after demobilization, the member must submit a new SGLI Election and Certificate (SGLV-8286) immediately.

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### **Work-Life Resources**

The Office of Work-Life (G-WKW) manages the Coast Guard's Work-Life Program. This staff is responsible for establishing, developing and promulgating Work-Life policy, and interpreting program standards for Coast Guard-wide implementation. Their objective is to support the well being of active duty, reserve, civilian employees, and their family members.

Thirteen field Work-Life Staffs assigned to Integrated Support Commands (ISC) and the Headquarters Support Command oversee the Work-Life program. They coordinate a myriad of programs, including training, mandatory reporting, marketing, measuring and evaluation, networking with local care providers, education, and outreach.

Mobilized reservists are counseled on the following upon activation:

- (1) Employee Assistance Programs
- (2) Relocation Assistance Program
- (3) Transition Assistance Program
- (4) Special Needs Program

To contact the nearest Work-Life Staff, call 1-800-872-4957.

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## **Mobilization (Continued)**

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Screening the Ready Reserve, Department of Defense Directive 1200.7  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Coast Guard Manpower Mobilization Support and Plan, COMDTINST M3061.1  
Medical Manual, COMDTINST M6000.1B  
The Soldiers' and Sailors' Civil Relief Act of 1940 (SSCRA)  
The Uniformed Services Employment and Reemployment Rights Act (USERRA)  
Reserve Forces Almanac

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**Additional  
Information**

[U. S. Coast Guard Reserve: http://www.uscg.mil/reserve/reshmpg.html](http://www.uscg.mil/reserve/reshmpg.html)  
[U. S. Code: http://assembler.law.cornell.edu/uscode/](http://assembler.law.cornell.edu/uscode/)  
[CGPC: http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm](http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm)  
[Forms and Worksheets: http://www.uscg.mil/hq/psc/forms/index.htm](http://www.uscg.mil/hq/psc/forms/index.htm)  
[Direct Access: http://www.uscg.mil/hq/psa/cghrms](http://www.uscg.mil/hq/psa/cghrms)  
[Active Duty Allowances: http://www.dtic.mil/perdiem/rateinfo.html](http://www.dtic.mil/perdiem/rateinfo.html)  
[PSC: http://www.uscg.mil/HQ/PSC/](http://www.uscg.mil/HQ/PSC/)  
[Work-Life: http://www.uscg.mil/hq/g-w/g-wk/wkw/index.htm](http://www.uscg.mil/hq/g-w/g-wk/wkw/index.htm)  
[Healthcare Benefits: http://www.tricare.osd.mil/](http://www.tricare.osd.mil/)  
[Legal Readiness: http://www.uscg.mil/hq/reserve/Recall/Recall.htm](http://www.uscg.mil/hq/reserve/Recall/Recall.htm)  
[SSCRA: http://www.uscg.mil/legal/la/topics/sscra/about\\_the\\_sscra.htm](http://www.uscg.mil/legal/la/topics/sscra/about_the_sscra.htm)  
[ESGR/USERRA: http://www.esgr.org/](http://www.esgr.org/)  
[Department of Defense:  
http://www.dtic.mil/whs/directives/corres/html/12007.htm](http://www.dtic.mil/whs/directives/corres/html/12007.htm)

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## Recall of Retired Members

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**General  
Information**

During a mobilization, reserve retirees may be called to active duty. This includes both retired with pay (RET-1) and retired awaiting pay (RET-2) personnel.

ISC (pf) personnel may request the recall of retired members if Ready Reserve forces cannot be utilized for mobilization. Retirees may be recalled for Title 10 and Title 14 involuntary mobilizations.

An approved physical examination may be required prior to executing orders for recall to active duty.

ISC (pf) and Coast Guard Personnel Command (CGPC) staff work together to orchestrate a member's mobilization.

CGPC Reserve Personnel Management (rpm), Officer Personnel Management (opm), or Enlisted Personnel Management (epm) Divisions issue retired recall orders. Orders are mailed to recalled retirees in advance of the mobilization date.

When members are demobilized, they return to their reserve component held prior to recall. If a member retired with pay (RET-1) or reached their 60<sup>th</sup> birthday during mobilization, the member's retired pay is (re)started after demobilization.

---

**Retired Recall  
Chain of  
Responsibility**

ISC (pf):

- (1) Request retired personnel for assignment
- (2) Schedule physical exam for member if no current exam on file

Member:

- (1) Undergo medical screening

CGPC:

- (1) Upon medical clearance, issue orders
- (2) Coordinate travel needs with recalled member

Member:

- (1) Report to duty as ordered
  - (2) Prepare Travel Voucher (DD-1351-2)
  - (3) Update Servicemembers' Group Life Insurance (SGLI) beneficiaries and coverage
  - (4) Submit to unit admin
- 

**Recall of Retired Members (Continued)**

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**Retired Recall  
Chain of  
Responsibility  
(continued)**

Unit:

- (1) Report member aboard for mobilization
- (2) Arrange for member to receive active duty identification card
- (3) If member to reach age 60 prior to end of orders, submit Age Waiver Request to the Office of Reserve Affairs-Reserve Policy and Programs Division (G-WTR-1) using Coast Guard memorandum format

Personnel Reporting Unit (SPO):

- (1) Use Direct Access (DA) and other appropriate transactions to

record the member's recall from retirement

Personnel Service Center-Retiree and Annuitant Services (PSC-RAS):

- (1) If member retired with pay (RET-1), stop retired pay
- (2) If retired awaiting pay at age 60 (RET-2), prepare transaction to transfer member out of RET-2 status

Member:

- (1) Log on to DA
- (2) Home > Self Service > Employee > Tasks
- (3) Review and update Emergency Contacts, Home and Mailing Address, Phone Numbers, Direct Deposit, W-4 Tax Information, and State Tax Information sections
- (4) If internet is not accessible, contact servicing SPO for support

PSC:

- (1) Process travel claim and travel advances (if requested)

SPO:

- (1) Maintain pay and leave accounts during mobilization

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## References

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Coast Guard Manpower Mobilization Support and Plan, COMDTINST M3061.1

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## Recall of Retired Members (Continued)

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### Additional Information

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
CGPC: <http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>  
Active Duty Allowances: <http://www.dtic.mil/perdiem/rateinfo.html>  
PSC: <http://www.uscg.mil/HQ/PSC/>  
Memorandum Format: [http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM\\_5216\\_4C.pdf](http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM_5216_4C.pdf)

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## Demobilization

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### **General Information**

Demobilization, or release from active duty (RELAD), is a term used for processing recalled reservists to return to civilian life and former reserve status.

When members are demobilized, they are returned to their reserve component held prior to recall: Selected Reserve, Individual Ready Reserve, or Retired (SELRES/IRR/RET) status.

The servicing ISC (pf) shall ensure reservists are reassigned to the appropriate Reserve Personnel Allowance List (RPAL) billets.

Mobilized reservists maintain their position and the seemingly vacant billet is not available for assignment consideration. Upon demobilization, reservists normally return to their former positions, though subject to availability and the needs of the Service.

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**Demobilization Approval**

Units should seek approval via message traffic from the proper authority before demobilizing reserve personnel. The approval authority is the unit's Operational Commander/Program Manager at the Headquarters, Area, Maintenance and Logistics Command (MLC), or District level.

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**Demobilization Considerations**

The following will be considered when commands determine a demobilization sequence:

- (1) Mission requirements
  - (2) Reservist's desire to continue active duty service
  - (3) Member's personal hardships, family needs, length and nature of previous title or service, employment concerns, etc.
  - (4) Number of months available prior to completing 24 month cumulative Title 10 service
  - (5) Expiration of enlistment, effective dates for requests for RET-1 or RET-2 (Retirement) status
  - (6) Member's proximity to duty sites
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## Demobilization (Continued)

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**Command Guidance**

Once a notice of demobilization is received by a command, the demobilization notice period should be used to:

- (1) Complete or continue rate and billet training
- (2) Complete or continue advancement training and qualifications, including the Supplemental Advancement and Service Wide Examinations
- (3) Complete RELAD medical and physical examinations
- (4) Complete final travel claims
- (5) Resolve outstanding pay issues

- (6) Complete evaluation submissions
- (7) Complete leave unless member elects to sell back leave
- (8) Receive appropriate recognition

Commands should identify members for demobilization at least 45 days in advance of the intended departure date.

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**Determining  
RELAD Dates**

Units and Personnel Reporting Units (SPO) shall remain aware of the pay cut-off dates to help avoid placing RELAD reservists in an over-pay or under-pay status. Ideally, RELAD dates should be either the 15<sup>th</sup> or the last day of the month. Extending active duty to meet the next pay date is a generally accepted practice.

After determining a member's exact demobilization date, units shall notify the member, the servicing SPO, and ISC (pf). This notice should be given no later than 14 business days prior to the effective termination date.

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**Earned Leave**

Reservists opting to take terminal leave are not required to schedule leave usage so the last day under orders is on the 15<sup>th</sup> or last day of the month. Terminal leave may end on any day of the month. Only the RELAD date needs to coincide with the end of a pay period.

The 60-day career limitation for selling accrued leave does not apply with respect to leave accrued by a reservist while serving any length of active duty in support of a contingency operation.

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**Demobilization (Continued)**

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**Earned Leave  
(continued)**

Members are not entitled to lodging plus per diem (lodging, meals, and incidentals) on any day classified as leave, including terminal leave. The only exception applies to members who obtained lodging on a monthly basis. These members may be reimbursed lodging expenses. All other benefits and entitlements awarded to members on active duty are awarded while on leave, including terminal leave.

**RELAD Location**      Recalled reservists shall be RELAD at the same site at which they were initially ordered to report. Exceptions may be granted on a case-by-case basis. The servicing ISC (pf) is the approving authority of these exceptions as requested by units.

If exceptions are approved, the ISC (pf) shall coordinate with units to facilitate the member's transition from active duty to reservist.

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**Medical Release**      Reservists recalled to active duty for 31 days or more, and soon to be released back to the SELRES, must be deemed Fit For Full Duty (FFFD) before demobilization. All demobilizing reservists must obtain physical and dental examinations. Females must receive a pelvic examination if a current exam is not on file. The unit shall ensure the member has completed the medical discharge requirements.

If a member was injured while on active duty, the member may be retained on active duty for the duration of treatment and recovery of that illness, injury, or disease. Recovering reservists may consent to remain on Title 10 orders during the recovery period. If the member's Title 10 orders are due to expire, the SPO shall extend such orders by adjusting the expected active duty termination date in Direct Access.

Injured members who do not consent to being retained on active duty shall request a Notice of Eligibility (NOE) for medical benefits prior to release from active duty. If eligible, members receive the medical or dental care appropriate for the treatment of the injury, illness, or disease until the resulting disability cannot be materially improved by further hospitalization or treatment.

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## Demobilization (Continued)

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**Medical Release (continued)**      The NOE may also allow the injured reservist to receive incapacitation pay. The amount awarded shall be the lesser of the lost civilian income or estimated Coast Guard pay as though the member was on active duty.

Commands should complete the NOE request in accordance with the Reserve Policy Manual.

Approved demobilization physical examinations are valid for five years. Eye exams and pelvic exams are valid for two years. Dental check-ups are valid for one year.

If a member received a physical less than 9 months before the requisite demobilization physical, a modified physical exam is given.

Examinations may be scheduled from 6 months to 1 month before demobilization.

Reserve members must receive a physical exam quinquennially, or once every five years. Released members whose age ends in “0” or “5” should request a quinquennial physical when obtaining their demobilization physical. The examination is the same, but the paperwork differs. Asking medical staff to complete both examination forms satisfies the physical exam requirement for the next five years. For reservists over the age of 50, the demobilization physical satisfies the annual medical screening requirement, provided the member asks for the examination to count as both physical requirements.

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**Certificate of Release or Discharge From Active Duty (DD-214)**

A Certificate of Release or Discharge From Active Duty (DD-214) is issued to all members upon completion of a period of mobilization. SPOs shall produce this and other demobilization paperwork for the member upon notification of RELAD date.

The DD-214 will state the reservist’s participation in a specific operation. It will additionally identify the provision of law under which the reservist served on active duty and the dates, if any, of service in designated imminent danger pay areas.

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## Demobilization (Continued)

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**Certificate of Release or Discharge From Active Duty (DD-214) (continued)**

Additionally, the DD-214 shall reflect all medals and awards received, including the Armed Forces Reserve Medal with “M” device and National Defense Medal as appropriate.

If a member is being immediately placed on further active duty upon demobilization, the DD-214 will not be issued until the end of that additional active duty.

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**Demobilization  
Chain of  
Responsibility**

After a member has been identified for demobilization via message traffic:

Mobilization Unit:

- (1) Coordinate demobilization and transfer to unit from which the member was initially ordered to report (RELAD Unit) with ISC (pf) and SPO
- (2) Ensure member is physically qualified for demobilization
- (3) Notify SPO if member has uncollected Mutual Assistance loans that need to be collected from active duty pay. Coordinate payment if necessary

Member:

- (1) Complete Career Intentions Worksheet (CG PSC-2045) no later than 45 days prior to release, being sure to indicate how leave is to be used
- (2) Forward to SPO

Mobilization Unit (or SPO if unit has limited administrative capabilities):

- (1) Record any medals, awards, or competencies earned by member while in a mobilization status in Direct Access (DA)

SPO for Mobilization Unit:

- (1) Upon receipt of Career Intentions Worksheet (CIW), input statement in DA
- (2) When member transfers to RELAD unit, forward SPO Personnel Data Record (PDR) back to the SPO of the member's regularly assigned unit (RELAD Unit)

Member:

- (1) At least 30 days prior to demobilization, update contact information in DA

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**Demobilization (Continued)**

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**Demobilization  
Chain of  
Responsibility  
(continued)**

RELAD Unit SPO:

- (1) At least 15 days prior to demobilization, prepare Personnel Data Information File (PDIF) and DD-214
- (2) Mail to unit for delivery to member

Member:

- (1) Upon receipt, verify content of PDIF and DD-214
- (2) Notify SPO if any discrepancies are noted

RELAD Unit:

- (1) On member's RELAD date, deliver DD-214 and Travel Voucher (DD-1351-2) to member
- (2) Mail member's medical records to member's regularly assigned unit

SPO for RELAD Unit:

- (1) On member's RELAD date, transmit separation transactions

Personnel Service Center (PSC):

- (1) On member's RELAD date, process final active duty payment
- (2) If applicable, collect Mutual Assistance debts

ISC (pf):

- (1) Place member back on the RPAL. If the same or similar position is vacant at the member's unit, member is removed from the unbudgeted position and placed in a budgeted position

When the RELAD transaction is processed in DA it will convert the previously completed Reserve Orders status from "Enroute" to "Finished."

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**Enlistment  
Expiration**

Reservists whose enlistments normally would have expired while they were involuntarily recalled to active duty, except that their enlistment was involuntarily extended, shall be expeditiously discharged or released from active duty as appropriate, unless they are qualified for and request re-enlistment. These members requesting to re-enlist shall be immediately re-enlisted to prevent a break in service.

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## Demobilization (Continued)

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**Reserve Military  
Identification Cards**

Recalled reservists on active duty for a period longer than 30 days should have an active duty Common Access Card (CAC) identification. Upon demobilization and completion of terminal leave, if taken, members are to be reissued a CAC with their former status indicated. Reservists are responsible for obtaining a new identification card after their separation date. New cards can be obtained from any local ID

card issuing facility, since all required data has been entered into the DEERS/RAPIDS (Defense Enrollment and Eligibility Reporting System/Real-Time Automated Personnel Identification System) database. Members must bring their DD-214 to the issuing facility.

Spouses and dependants of demobilized reservists must obtain new identification cards as well.

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**Reserve Training  
and Drill  
Requirements**

Demobilized reservists returning to the SELRES have the option of completing Active Duty for Training-Annual Training (ADT-AT). Though service obligations have been satisfied, members can coordinate ADT-AT, provided there is enough time in the fiscal year to execute orders and complete training.

Reservists who have been placed on active duty (voluntary or involuntary recall) are not required to complete 48 Inactive Duty for Training (IDT) drills. The active duty service overrides the monthly IDT drill requirements. For example, if a member is on active duty for two months, they are not required to make up the weekend drills missed during the active duty period. The eight skipped drills do not need to be rescheduled; the reservist's annual drill obligation is lowered to 40.

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**Pay Issues**

Mobilized members are reminded to check their Leave and Earning Statements (LES) every month.

Members must review their LES and report any discrepancies via the chain of command. The member must report any instance where:

- (3) The LES shows a pay entitlement to which the member is not entitled
  - (4) The member continues to be paid pay and allowances after being released from active duty
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**Demobilization (Continued)**

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**Pay Issues  
(continued)**

Reservists who are overpaid will be required to repay such overpayments, plus interest. Any overpayments will be collected in lump sum from a member's final separation pay, and from future Active Duty for Training (ADT) or Inactive Duty Training (IDT) earnings to which the member is entitled after release from active duty.

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**Civilian  
Reemployment  
Rights**

Reservists recalled to active duty are entitled to legal protections. Congress provided clear protection for all members of the uniformed services (including non-career National Guard and Reserve members, as well as active duty personnel) in October 1994, with passage of the Uniformed Services Employment and Reemployment Rights Act (USERRA), 38 U. S. Code.

The Department of Labor is the enforcement authority for USERRA and it processes all formal complaints of violations of the law.

A person who leaves a civilian job for voluntary or involuntary “service in the uniformed services” is entitled to reemployment in the civilian job (with accrued seniority) if he or she meets the following eligibility criteria:

- (1) Must have left the job for the purpose of performing service in the uniformed services
  - (2) Must have given prior oral or written notice to the civilian employer. Prior notice is not required if it is precluded by military necessity or otherwise impossible or unreasonable
  - (3) Cumulative period or periods of service in the uniformed services, relating to that particular civilian employer, must not have exceeded the five-year limit. All involuntary service and some voluntary service are exempted from the five-year limit
  - (4) Must have been released from the period of service, without having been “dropped from the rolls” or having received a punitive or other-than-honorable discharge
  - (5) Must have reported back to work in a timely manner, or have submitted a timely application for reemployment
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**Demobilization (Continued)**


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**Civilian  
Reemployment  
Rights (continued)**

The term “service in the uniformed services” means the performance of duty on a voluntary or involuntary basis in a uniformed service under competent authority and includes active duty, active duty for training, inactive duty training, full-time National Guard duty, a period for which a person is absent from a position of employment for the purpose of an examination to determine the fitness of the person for any such

duty, and a period for which a person is absent from a position of employment for the purpose of performing funeral honors duty as authorized by section 12503 of Title 10 or section 115 of Title 32.

The right to reemployment is not contingent upon the existence of a vacancy. Sometimes it is necessary for the employer to displace another employee in order to reemploy the returning veteran. Congress recognized that this law imposes burdens on employers, and that sometimes those burdens can be severe. Congress decided that imposing such burdens on employers is justified by the national defense needs of our nation.

Members must be treated, for seniority purposes, as if they had been continuously employed. Members are also entitled to receive missed employer contributions to pension plans as if they had been continuously employed.

Reservists are entitled to immediate reinstatement of health plan coverage, through the job, including coverage for family members. There must be no waiting period and no exclusion of “pre-existing conditions” (except conditions that the U.S. Department of Veterans Affairs has determined to be service-connected).

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**Returning to the  
Civilian Workforce**

If the period of active service is less than 31 days, members are required to report for work “not later than the beginning of the first regularly scheduled work period on the first full calendar day following the completion of the period of service and the expiration of eight hours after a period allowing for the safe transportation of the person from the place of that service to the person’s residence.”

If reporting at that time is impossible or unreasonable through no fault of the member (e.g., automobile accident on return trip), members are required to report for work as soon as possible thereafter.

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**Demobilization (Continued)**

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**Returning to the  
Civilian Workforce  
(continued)**

If the period of service was 31-180 days, members are required to submit an application for reemployment within 14 days after the end of the period of service.

If the period of service was 181 days or more, members must submit an application for reemployment within 90 days. These deadlines can be

extended by up to two years if the reservist is hospitalized for or convalescing from a service-connected injury or illness.

To submit an application for reemployment, no particular form is required. A member can contact their employer, simply state that the member has departed from active duty and intends to return to their former job. Employers must not treat reservists as if they were applying for a new job. While it is recommend that members make an explicit written application for reemployment, the application for reemployment can also be made orally, or even by implication. A copy of orders or DD-214 is not legally required to reclaim a civilian job.

If the period of service was less than 31 days, and a member shows up for work at 8 a.m. on the next workday, members must be put back on the payroll immediately. If the period of service was 31 days or more, the employer is required to act promptly upon a member's application for reemployment. This should be a taken care of in a matter of days, not weeks or months.

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**Transitional  
Healthcare Benefits**

Reservists and their dependants are eligible for transitional health care benefits when the member separates from active duty. Transitional health care benefits are available to:

- (1) Reservists recalled to active duty in support of a contingency operation for periods of more than 30 days
  - (2) Members who are separated from active duty after being involuntarily retained on active duty in support of a contingency operation
  - (3) Members separated from active duty following a voluntary agreement to stay on active duty for a period of less than one year in support of a contingency operation
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## Demobilization (Continued)

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**Transitional  
Healthcare Benefits  
(continued)**

If a reservist served less than six years total in active federal military services, health benefits end 60 days after the separation date. If a member has six years or more of total active federal service, benefits end 120 days after the separation date.

The family members of the reservist eligible for transitional health care

are also eligible.

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**Servicemembers’  
Group Life  
Insurance (SGLI)**

Servicemembers’ Group Life Insurance (SGLI) is a program of low cost group life insurance for military members.

Coverage is automatically set up for members, but is not mandatory. Coverage is automatically increased to the maximum amount upon mobilization. Recalled reservists are also covered for 120 days following separation or release from duty.

If the member does not desire continued maximum coverage after demobilization, the member must submit a new SGLI Election and Certificate (SGLV-8286) immediately.

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Coast Guard Manpower Mobilization Support and Plan, COMDTINST M3061.1  
Medical Manual, COMDTINST M6000.1B  
The Uniformed Services Employment and Reemployment Rights Act (USERRA)

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>  
PSC: <http://www.uscg.mil/HQ/PSC/>  
Transitional Health Benefits: <http://www.tricare.osd.mil/>  
ESGR/USERRA: <http://www.esgr.org/>  
SGLI: <http://www.insurance.va.gov/>

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## Voluntary Active Duty after Involuntary Recall

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**General  
Information**

The involuntary recall of reservists for mobilization under Title 10 orders is limited to no more than 24 months. After cumulative 24 months, a reservist may volunteer for further active duty in support of mobilization efforts.

A mobilized member’s orders may be extended by the ISC (pf). If a

member's orders are extended, the ISC (pf) shall notify the member and the servicing Personnel Reporting Unit (SPO).

Reservists who volunteer for additional Title 10 mobilization duty are entitled to the same pay, allowances, compensation, rights, privileges, and protections they had while in an involuntary recall status.

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## **Orders**

Reservists retained on mobilization duty with their consent will be issued new orders. The orders will be Active Duty Special Work in support of the Active Component (ADSW-AC) or Extended Active Duty (EAD) orders.

As with involuntary orders, the reservists will be assigned to the mobilization duty site in a temporary duty (TDY) status. A Permanent Change of Station (PCS) is not required.

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## **Benefits and Entitlements**

If a reservist is released from Title 10 orders and immediately placed under a different set of orders on further active duty for a period of 140 days or greater, some benefits will change. If the member will not be assigned government quarters, the Basic Allowance for Housing (BAH) rate will be determined by the zip code of the member's duty station locale, not the zip code of the member's residence. Cost of Living Allowance (COLA) rates will also change. This allowance will be based on the zip code of the duty station and not the zip code of the member's residence.

If a reservist is released from Title 10 orders and immediately placed under a different set of orders on further active duty for a period of 139 days or less, the member will be entitled to BAH-II working under these orders. The reservist continues to earn leave while on active duty, even if the follow-on active duty period is for less than 30 days. This is because the reservist has remained on consecutive active duty.

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## **Voluntary Active Duty after Involuntary Recall (Continued)**

### **Active Duty Chain of Responsibility**

Member:

- (1) At least 45 days before termination of orders or upon notification, fill out Career Intentions Worksheet (CG PSC-2045)
- (2) Submit to supervisor

Supervisor:

- (1) Sign form
- (2) Forward to Department Head

Department Head:

- (1) Sign form
- (2) Forward to Command

Command:

- (1) Sign form
- (2) Submit to SPO

District Headquarters:

- (1) Approve recall position extension requests from units
- (2) Notify SPO of approved Title 10 position extensions

SPO:

- (1) Process Career Intention Worksheet for approved members
- (2) Prepare and submit a Statement of Intent

ISC (pf):

- (1) Enter and approve orders in Direct Access (DA) if not done by SPO
- (2) Approve orders if entered in DA by SPO
- (3) Issue Travel Order Number (TONO)

SPO:

- (1) Prepare Amend Reserve Expected Active Duty Termination Date transaction
  - (2) Change member's active duty end date
  - (3) Set expiration date of new orders
  - (4) Issue orders to member
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## **Voluntary Active Duty after Involuntary Recall (Continued)**

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**Active Duty Chain  
of Responsibility  
(continued)**

ISC (pf):

- (1) If member is on EAD, remove from billet, vacate position
- (2) If member is on ADSW-AC, hold billet

Member:

## (1) Report to duty as ordered

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<b>Employer Notification</b>	A member's employer will be notified when mobilization orders are issued or extended. The letter will state that the reservist "has been involuntarily retained on active duty" regardless of the extension being voluntary.
<b>Certificate of Release or Discharge From Active Duty (DD-214)</b>	A Certificate of Release or Discharge From Active Duty (DD-214) is issued to all members upon completion of a period of mobilization. However, if a member is being immediately ordered to further active duty upon demobilization, the DD-214 will not be issued until the end of the additional active duty.
<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A Personnel and Pay Procedures Manual, PSCINST M1000.2A Coast Guard Pay Manual, COMDTINST M7220.29A 10 USC 12301(d)
<b>Additional Information</b>	U. S. Coast Guard Reserve: <a href="http://www.uscg.mil/reserve/reshmpg.html">http://www.uscg.mil/reserve/reshmpg.html</a> U. S. Code: <a href="http://assembler.law.cornell.edu/uscode/">http://assembler.law.cornell.edu/uscode/</a> Forms and Worksheets: <a href="http://www.uscg.mil/hq/psc/forms/index.htm">http://www.uscg.mil/hq/psc/forms/index.htm</a> Active Duty Allowances: <a href="http://www.dtic.mil/perdiem/rateinfo.html">http://www.dtic.mil/perdiem/rateinfo.html</a> CGPC-rpm: <a href="http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm">http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm</a>

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## Integration

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<b>General Information</b>	The Coast Guard often grows to meet the challenges associated with Homeland Security and increased operational responsibilities.
	Coast Guard Personnel Command (CGPC) frequently solicits Reserve

members to augment active forces through integration. CGPC-epm (Enlisted Personnel Management Division) and CGPC-opm (Officer Personnel Management Division) manage the integration process.

Reservists who integrate into the regular Coast Guard will be removed from the Reserve Personnel Allowance List (RPAL).

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## **Officer Integration**

When Reserve officers, except Reserve Program Administrators, remain on active duty for an extended period, they lose identification as officers held in reserve for an emergency. Once an Active Duty Promotion List (ADPL) best-qualified promotion board selects reserve officers, the Coast Guard has recognized the potential and skills possessed for long-term active service. ADPL-selected members are eligible to integrate as permanent regular officers.

Integrating to permanent regular officer status allows a member to remain on active duty for up to 30 years of commissioned service, as opposed to 30 years of active service.

To qualify for integration, reserve or temporary active duty officers must meet the following requirements:

- (1) Comply with the Coast Guard's maximum allowable weight standards at the time of administration of the oath of office for integration
  - (2) At the time of the administration of the oath of office for integration, not be subject of or party to a pending investigation which could result in adverse action against the officer, nor accused pending proceedings under the Uniform Code of Military Justice, nor the subject of a pending administrative board for possible separation
  - (3) Have completed two years of continuous active Coast Guard duty during the current active duty period
  - (4) Have been selected for promotion by any ADPL board under the best-qualified selection system
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## **Integration (Continued)**

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### **Officer Integration Process**

Once a reserve officer has been selected by their first best-qualified ADPL selection board:

CGPC-opm:

- (1) Request appointment authority and Senate confirmation for officers eligible for permanent regular status
- (2) Review member's records for disqualifying actions since ADPL selection
- (3) Send appointment letter to member's unit, directing the command to administer the oath of office

Unit:

- (1) Confirm officer still meets eligibility requirements
- (2) Administer oath of office

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**Enlisted Integration Requirements**

CGPC-epm will identify active duty positions available to qualifying reservists. Applicants must be available for worldwide assignment in duties they are filling, including sea and isolated duty.

Submitting an application is not a guarantee that a member will be integrated. Member qualifications, performance, and the needs of the service are used to determine integration.

If selected for integration, enlisted reservists currently mobilized will not be allowed to integrate until their services are no longer required or a replacement is mobilized.

Enlisted reservists who are approved for integration must participate in the active duty Service Wide Examination (SWE) competition for future advancements.

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## **Integration (Continued)**

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**Enlisted Application Chain of Command**

Member:

- (1) Contact CGPC-epm-2 for assignment opportunities
- (2) Submit application using a Request for Extended Active Duty form (CG-3472)

- (3) In the block "Reason for Request" enter:
  - (a) Request to integrate into the regular Coast Guard
  - (b) Assignment or geographic preference
  - (c) A day time telephone number for Assignment Officer use
  - (d) A statement acknowledging the impact of integration on Montgomery G. I. Bill (MGIB) entitlements
- (4) Forward to Commanding Officer

Commanding Officer:

- (1) Endorse CG-3472
- (2) Forward to servicing ISC (pf)

ISC (pf):

- (1) Endorse application
- (2) Forward to CGPC-epm-1

CGPC-epm:

- (1) Evaluate applications
- (2) Select members for integration
- (3) Notify members, ISC (pf) and commands by Coast Guard Message System
- (4) Authorize the member to enlist or re-enlist in the regular Coast Guard for a period of 4 years
- (5) Transmit Permanent Change of Station (PCS) orders (conditional upon execution of enlistment/re-enlistment contract)

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**References**

Coast Guard Personnel Manual, COMDTINST M1000.6A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A

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**Additional  
Information**

CGPC: <http://www.uscg.mil/hq/cgpc/home/newcgpchome.htm>

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## Release from Active Duty (RELAD)

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**General  
Information**

One of the best sources of new reservists is former active duty Coast Guard personnel. Many members leave active duty without a full appreciation of the benefits of reserve membership, including re-enlistment and affiliation bonuses, retirement pay, and tuition

assistance.

Regular active duty members being released from active duty who have not met their military service obligation (MSO) are placed into the Reserve component for the duration of their initial contract. The release from active duty (RELAD) transaction places members in one of two reserve categories; the Selected Reserve (SELRES) or the Individual Ready Reserve (IRR).

If a member is placed in the SELRES, the member becomes a regular drilling reservist. The member must complete 48 drills and train two weeks per year.

If a member is RELAD and does not participate in the SELRES program, the member is transferred to the IRR. The Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) maintains updated contact information for IRR members.

If a member has met his/her military obligation, the member shall be discharged from the active duty component and accessed into the Coast Guard Reserve component if he/she desires. If a member has no military obligation, he/she is not required to be accessed into the Coast Guard Reserve component.

Officers and enlisted personnel may apply for SELRES affiliation. Members should contact their local ISC (pf) for time-in-service limitations, drilling opportunities, and other requirements.

Members not recommended for advancement or re-enlistment by an active duty command are generally not recommended for enlistment or transfer to the Reserves.

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**Additional  
Guidelines**

If a member is within their 8-year MSO and separates from active duty, there will not be a break in service, whether or not the member was assigned to a reserve billet. The remainder of the MSO will be carried out in either the SELRES or the IRR.

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## Release from Active Duty (RELAD) (Continued)

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**Additional  
Guidelines**

Members whose active duty service exceeds 8 years, regardless of assignment to the SELRES or IRR, must enlist in the reserve within 24-

**(continued)**

hours of discharge or there will be a break in service.

Members retain their rank unless discharged. If there is no service lapse from active duty to reserve service, time in grade and time in service will continue to accrue.

**Medical Issues**

A complete physical examination is required within 12 months of release from active duty (RELAD) into the Ready Reserve (selected drilling or IRR). The physical examination shall follow the guidelines set forth for quinquennial physicals.

**Pre-Separation Interviews**

Commanding Officers and Career Development Advisors (CDA) should ensure that eligible personnel are adequately counseled on the benefits of the Coast Guard Reserve before being released from active duty.

Units are required to conduct pre-discharge and follow-up interviews with members starting six months prior to separation or discharge. The purpose of these interviews is to determine the eligibility for re-enlistment and to advise members of career options. Members who do not desire to re-enlist in the Coast Guard are encouraged to consider immediate affiliation with the Coast Guard Reserve.

CDAs shall discuss the following reserve features:

- (1) Drill requirements
- (2) Pay benefits
- (3) Retirement possibilities
- (4) Medical and dental benefits
- (5) Commissary and exchange privileges
- (6) Servicemembers' Group Life Insurance (SGLI)
- (7) Montgomery G. I. Bill (MGIB) and other education assistance
- (8) Active duty contracts

**Release from Active Duty (RELAD) (Continued)****RELAD Chain of Responsibility**

Unit Reserve Liaison or CDA:

- (1) Six months before active duty member's separation date,

- schedule counseling on re-enlistment and reserve affiliation
- (2) Four months before member's separation date, schedule briefing on reserve program

Member:

- (1) Inform Command of desire to join the Reserves
- (2) Prepare Career Intentions Worksheet (CG PSC-2045)
- (3) Submit form to Servicing Personnel Office (SPO)
- (4) Contact CGPC-rpm
- (5) Schedule, obtain physical examination

SPO:

- (1) Prepare and transmit Statement of Intent

CGPC-rpm:

- (1) Contact ISC (pf) nearest to member's RELAD residence

Post-RELAD ISC (pf):

- (1) Inform member about specific reserve opportunities
- (2) Locate units within a reasonable commuting distance (RCD) from member
- (3) Determine if units within RCD have vacancies matching member's skill set and rate, if not, provide member with alternatives (IRR, lateral changes in rating, etc.)

Member:

- (1) Log on to Direct Access (DA) > Home > Self Service > Tasks > Create E-Résumé

Unit:

- (1) Endorse member's E-Résumé

Member:

- (1) If not contacted within 15 days of submitting E-Résumé, contact the appropriate ISC (pf)
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## Release from Active Duty (RELAD) (Continued)

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**Responsibility  
(continued)**

- (1) Review member's E-Résumé
- (2) Initiate assignment process
- (3) If the member requests immediate reserve affiliation, assign member to unit effective one day after separation (SELRES option)
- (4) If member does not request immediate reserve affiliation, assign member to the IRR (endorse and forward request to CGPC-rpm)
- (5) Approve assignment request
- (6) Submit authorization orders through Direct Access (DA)  
(Authorization orders are automatically generated by DA and sent, via e-mail, to the member, member's servicing SPO, and the member's gaining SPO)

**Member's SPO:**

- (1) Process and complete reserve assignment upon member's RELAD
- (2) Deliver Certificate of Release or Discharge From Active Duty (DD-214) to member on day of discharge
- (3) Transmit Discharge Separation transaction
- (4) Transmit Rehire transaction (if necessary)

**Member:**

- (1) If joining SELRES, upon receipt of orders, contact new unit for reporting information

If reserve affiliation delay requested, satisfy IRR requirements (uniform maintenance, Annual Screening Questionnaire, etc.).

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**Reporting to  
Drilling Unit**

Members must contact their new unit to obtain reporting requirements. It is highly recommended that members contact their assigned drilling unit before leaving active duty.

Members are expected to report to their drilling unit within one month of being released from active duty.

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## **Release from Active Duty (RELAD) (Continued)**

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**Affiliation After**

Members who are considered discharge eligible and do not affiliate

**Discharge** with the Reserve component prior to being separated face a complicated and time consuming process to re-enter the Coast Guard. ISC (pf) personnel cannot approve re-enlistment for these individuals. Interested former members must contact their local recruiting office for re-affiliation information.

Under current regulations, individuals with prior Coast Guard service (E-3 and above) who have not actively participated in the Coast Guard for more than five years must attend Reserve Enlisted Basic Indoctrination (REBI), a two-week refresher course held in Cape May, New Jersey. REBI is not required for members who discharged within five years.

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**References** Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Coast Guard Medical Manual, COMDTINST M6000.1B

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**Additional Information** U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Recruiting: <http://www.uscg.mil/jobs/>  
RELAD: <http://www.uscg.mil/hq/reserve/RELAD/Index.htm>  
REBI: <http://www.uscg.mil/hq/capemay/RebiSchool.htm>  
Pay Charts: <http://www.uscg.mil/hq/psc/>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>

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## Reassignment of Position Number upon Release from Active Duty

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**General** Reserve personnel recalled to active duty under long-term ADSW

**Information**

orders, and those working under an Extended Active Duty (EAD) contract, lose their position number designation upon activation. As a result, the member's billet appears vacant on the Reserve Personnel Allowance List (RPAL).

Mobilized reservists maintain their position and the seemingly vacant billet is not available for assignment consideration. Upon demobilization, reservists normally return to their former positions.

Members voluntarily working under EAD contracts are removed from the RPAL and other reservists can fill the open billets.

Failure to effect realignment creates the illusion of vacant billets and puts members and receiving units at a disadvantage. Coast Guard Message System (CGMS) should be checked frequently.

**Position Number Processing**

The realignment process is completed by ISC (pf) Assignment Officers and should take place within five days of the demobilization message announcement.

Upon receiving demobilization/release message received from CGMS:

- (1) Review strip chart for accuracy
- (2) Log on to Direct Access (DA)
- (3) Proceed to retrieve listing of personnel attached to desired department (hit "Execute" without specifying duty status under Call Management menu)
- (4) Move to "Position History" tab
- (5) Scroll to bottom of page; all members without position numbers will be listed
- (6) Copy list and export it to Excel for ease of tasking (add two columns to annotate prior and new position numbers)
- (7) Check demobilization status
- (8) If member not yet demobilized, make annotations to avoid prematurely assigning a position number
- (9) If demobilized, check for previous position number
- (10) Under DA, click on Home > People Tools > Navigator > Assgn > Slate Development > Posn Change

## **Reassignment of Position Number upon Release from Active Duty (Continued)**

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|---|---|
| <b>Position Number Processing (continued)</b> | <ul style="list-style-type: none"><li>(11) Enter EMPLID, view department information, record of SNM (Said Named Member)</li><li>(12) Cross reference previous position number from strip chart report</li><li>(13) Attempt to assign members whose prior position numbers are vacant first</li><li>(14) Assign members to positions available at their unit</li><li>(15) If no billets are available at a member's unit, attempt to transfer member to a nearby unit</li><li>(16) If no units are available, place member in a Reserve Unbudgeted Position with original unit</li><li>(17) Notify member of reassignment location and of budgeted or unbudgeted status. If unbudgeted, inform member they are subject to relocation based on the needs of the Coast Guard</li></ul> |
|---|---|
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<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A
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<b>Additional Information</b>	Direct Access: <a href="http://www.uscg.mil/hq/psc/cghrms/">http://www.uscg.mil/hq/psc/cghrms/</a> Demobilization Status: <a href="http://cgweb.lant.uscg.mil/PDIV/RESERVELIST/">http://cgweb.lant.uscg.mil/PDIV/RESERVELIST/</a>
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## Position Number Request

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**General Information**

Applicants deemed qualified to enlist in the Coast Guard Reserve must be scheduled to attend boot camp or Reserve Enlisted Basic Indoctrination (REBI), formal “A” school, and have a unit assignment before any training can begin.

To formally start the scheduling and assignment process, recruiters must obtain a position number for USCGR applicants.

**Request Process**

Recruiter:

- (1) As soon as the applicant is qualified for service entry, call servicing ISC (pf) to request a position number (if a cancellation or accession processing delay occurs, notify ISC (pf) as soon as possible)

ISC (pf):

If a position number is available in selected rate and/or unit:

- (1) Notify recruiter
- (2) Assign Reserve position number

If a position number is not available in selected rate and/or unit and applicant is in a critical rating (BM, MK, MST, OS, and PS):

- (1) Notify recruiter
- (2) Contact commanding officer at applicant’s desired unit and request applicant be placed in an over-billet status
- (3) If unit approves the over-billet status, applicant will be accessed in a reserve unbudgeted position
- (4) Notify recruiter if member placed in unbudgeted position.
- (5) If the unit does not approve of placing member in an unbudgeted position, instruct recruiter to re-counsel the applicant on career choices

Recruiter:

- (1) For applicants accessed through the RX program, and upon receipt of position number, send Rate Determination Package (RDP) to ISC (pf)

ISC (pf), Recruiter, and Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm):

- (1) Follow RDP procedures

## Position Number Request (Continued)

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### Request Process (continued)

#### Recruiter:

- (1) When applicant deemed qualified for enlistment or approved for a rating, fax Reservation Request to CGRC-rpm and ISC (pf) (information included on the request includes the member's recruiting program, enlistment date, school start date, course of study, unit arrival date, and position number)
- (2) Forward Contract of Enlistment (DD-4) to ISC (pf)

#### ISC (pf):

- (1) File reservation request and DD-4, based on unit arrival date, in "tickler" file (if required)

#### Applicant:

- (1) Attend initial training
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### References

Coast Guard Personnel Manual, COMDTINST M1000.6A  
Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Recruiting Manual, COMDTINST M1100.2D

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### Additional Information

REBI Information: <http://www.uscg.mil/hq/capemay/RebiSchool.htm>  
Coast Guard Recruiting: <http://www.uscg.mil/hq/recruit/recruit.htm>

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## Reserve Accessions-Rate Determination Package (RDP)

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### General Information

Reservists accessed under the RX, RN, RQ, RJ, and RM (MARTP) programs and members re-accessed after a 5-year break in service must attend REBI before drilling at their assigned unit.

Recruiters, the servicing ISC (pf), and Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) work together to process an applicant's Rate Determination Package (RDP).

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### Rate Determination Packages and Processing New Accessions

Recruiter:

- (1) Forward RDP information to ISC (pf)

ISC (pf):

- (1) Evaluate package: review applicant's job skills, qualifications, ASVAB scores, recommendations, and prior service
- (2) Determine if member is fit to serve in desired rate
- (3) If deemed to have skill set at E-4 level, endorse package, notify Recruiter
- (4) If applicant is deemed to have skill set at E-5 level or above, forward RDP to Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) for approval
- (5) Complete packages shall be processed within three days

CGPC-rpm: (if applicant deemed E-5 or above by ISC (pf))

- (1) Review RDP
- (2) Inform Recruiter of endorsement decision by letter, send copy to servicing ISC (pf)

Recruiter:

- (1) Notify applicant of rate determination
  - (2) Notify applicant of enlistment and REBI dates
  - (3) Notify ISC (pf) of enlistment and REBI dates
  - (4) Notify CGRC-rpm of enlistment and REBI reservation
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## Reserve Accessions-Rate Determination Package (RDP) (Continued)

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<b>Rate Determination Packages and Processing New Accessions (continued)</b>	ISC (pf), Recruiter, CGPC-rpm: (1) Follow the final three steps of the “Position Number Request” Standard Operating Procedure
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<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A Personnel and Pay Procedures Manual, PSCINST M1000.2A Coast Guard Recruiting Manual, COMDTINST M1100.2D
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<b>Additional Information</b>	REBI Information: <a href="http://www.uscg.mil/hq/capemay/RebiSchool.htm">http://www.uscg.mil/hq/capemay/RebiSchool.htm</a> Coast Guard Recruiting: <a href="http://www.uscg.mil/hq/recruit/recruit.htm">http://www.uscg.mil/hq/recruit/recruit.htm</a>
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## Reserve Enlisted Basic Indoctrination (REBI)

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### General Information

Reserve Enlisted Basic Indoctrination (REBI) is a two-week training program designed to introduce incoming reservists new to the Coast Guard, allowed in the service as petty officers, to the customs, courtesies, and operations of the Coast Guard.

Reservists accessed under the RX, RN, RQ, RJ, and RM (MARTP) programs, and those members re-accessed after a 5-year break in service must attend REBI before drilling at their assigned unit.

REBI convenes approximately ten times each fiscal year at Training Center (TRACEN) Cape May, New Jersey.

---

### Academics and Training

Topics covered include:

- (1) Customs and Courtesies
  - (2) Military Drill
  - (3) Military Justice
  - (4) Roles and Missions of the Coast Guard
  - (5) Coast Guard History
  - (6) Coast Guard Regulations and Policies
  - (7) First Aid/CPR
  - (8) Survival Swimming
  - (9) Leadership
  - (10) Reserve Programs
  - (11) Emergency Drills
  - (12) Incident Command System
  - (13) Basic Seamanship
  - (14) Small Arms Training
- 

### References

Reserve Policy Manual, COMDTINST M1001.28A  
Personnel and Pay Procedures Manual, PSCINST M1000.2

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### Additional Information

REBI Information: <http://www.uscg.mil/hq/capemay/RebiSchool.htm>  
Coast Guard Recruiting: <http://www.uscg.mil/hq/recruit/recruit.htm>

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## **Selected Reserve Direct Commission (SRDC) Reserve Officer Candidate Indoctrination (ROCI)**

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### **General Information**

Reserve Officer Candidate Indoctrination (ROCI) is a three-week course designed to train Reserve Officer Candidates to serve effectively as junior officers in the Coast Guard Reserve.

The course is offered twice a year at the United States Coast Guard Academy in New London, Connecticut.

Enlisted and non prior-service candidates are required to attend ROCI before commissioning.

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### **Selected Reserve Direct Commission (SRDC)**

To attend ROCI candidates must be selected for a Selected Reserve Direct Commission (SRDC) appointment. Applicants must meet all eligibility requirements, complete a detailed application package, pass a personal interview, and be selected by a Coast Guard Personnel Command (CGPC) selection panel.

Enlisted applicants must be at least an E-4 and have passed the E-5 Service Wide Exam. They must also have a recommendation from their Commanding Officer, including those members in the Individual Ready Reserve (IRR).

There is a three-year reserve service obligation upon commissioning; no active duty is required.

Application packages and complete requirements are available online.

---

### **Academics and Training**

Topics covered include:

- (1) Military Indoctrination
  - (2) Coast Guard History Overview
  - (3) Coast Guard Roles and Missions
  - (4) Coast Guard Organization
  - (5) Readiness
  - (6) Reserve Personnel Management
  - (7) The Military Justice System
  - (8) Leadership
-

## **Selected Reserve Direct Commission (SRDC) Reserve Officer Candidate Indoctrination (ROCI) (Continued)**

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### **Application and Selection Process**

Member:

- (1) Turn in a complete application package to their unit Education Services Officer (ESO)

ESO:

- (1) Review all applications, ensure completeness
- (2) Arrange officer interview panel

Member:

- (1) Interviewed by panel

ESO:

- (1) After interview, forward application to Coast Guard Recruiting Command (CGRC) before published deadline

CGRC:

- (1) Review each application for eligibility submission to SRDC selection panel
- (2) Submit application package to SRDC selection panel

Selection Panel:

- (1) Meet and review application packages
- (2) Make recommendations

CGRC:

- (1) Announce, by Coast Guard Message System, applicants selected for SRDC
- (2) Inform members not selected for SRDC by mail

Member:

- (1) Attend ROCI as ordered

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Training and Policy Manual, COMDTINST M1500.10B

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### **Additional Information**

SRDC: <http://www.gocoastguard.com/dc/DCPrograms/SRDC.htm>

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## Direct Commission Officer Accession Programs

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### General Information

The Direct Commission Officer (DCO) program is a way for the Coast Guard to obtain officers with specialized training, depending on the needs of the service at any given time. These officers serve in positions reflecting their specialized training and experience.

Officer accession programs include:

- (1) Direct Commission Aviator
- (2) Direct Commission Engineer
- (3) Direct Commission Environmental Management Program
- (4) Direct Commission Intelligence Officer Program
- (5) Direct Commission Lawyer Program
- (6) Maritime Academy Graduate
- (7) Select Reserve Direct Commission

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### Application Information

Using the Coast Guard Message System and subsequently Reserve Message Traffic, the Coast Guard Recruiting Command (CGRC) posts a schedule of all officer accession program interview boards and provides submission details and deadlines for each program.

Unit Education Services Officers (ESO) should ensure the widest dissemination of information possible. Reservists interested in any commissioning program should contact their servicing ESO.

All applicants will be required to meet established age, education, citizenship, and health standards. Applicants must also complete a detailed application package, pass a personal interview, and be selected by a panel of Coast Guard members.

While these programs are intended to attract civilians with desirable professional training, reservists are welcome to apply. All programs, except the Select Reserve Direct Commission (SRDC) program, require a tour of active duty. Only SRDC, the first step to attending Reserve Officer Candidate Indoctrination (ROCI), is a reserve-specific commissioning program.

Application packages and complete requirements for all DCO programs are available online.

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## Direct Commission Officer Accession Programs (Continued)

<b>Direct Commission Aviator</b>	The Direct Commission Aviator (DCA) Program allows prior-trained pilots who have served as a commissioned aviation officer in another branch of the military to join the Coast Guard.
<b>Direct Commission Engineer</b>	The Direct Commission Engineer (DCE) Program offers individuals with degrees and experience in engineering the opportunity to earn a commission. DCE officers oversee the design, construction, and maintenance of Coast Guard vessels, merchant vessels, and shore facilities. Potential assignments also include designing systems to prevent oil spills, maintaining the Coast Guard's aids to navigation, or maintaining electronics and computer systems.
<b>Direct Commission Environmental Management Program</b>	The Direct Commission Environmental Management (DCEM) Program allows enlisted personnel and warrant officers in the Marine Safety field with environmental management experience, education, and training to earn a commission and work in their field of expertise in support of Coast Guard missions and international treaties.
<b>Direct Commission Intelligence Officer Program</b>	The Direct Commission Intelligence Officer (DCIO) Program allows graduates of accredited graduate and undergraduate programs in intelligence or with experience in the intelligence field to earn a commission in the Reserves.
<b>Direct Commission Lawyer Program</b>	The Direct Commission Lawyer (DCL) Program allows qualified law school graduates to earn a commission in the Reserves as a Lieutenant and serve as lawyers. Selected members attend a Direct Commission Officer (DCO) course, spend two weeks on a Coast Guard Operational unit, and attend the U. S. Navy Military Justice Course. Potential assignments include working at Coast Guard Headquarters, Maintenance and Logistics Commands, District Offices, or other major commands.

## Direct Commission Officer Accession Programs (Continued)

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<b>Maritime Academy Graduate (MARGRAD)</b>	The Direct Commission Maritime Academy Graduate (MARGRAD) Program is designed for who hold a Coast Guard Merchant Mariner license earned through a Maritime Academy. It is also available for Maritime Academy graduates that hold a degree in Marine Environmental Protection or a related degree, even if no license was earned.
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<b>Select Reserve Direct Commission</b>	Refer to the SRDC and ROCI sections for information.
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<b>Application Chain of Responsibility</b>	<p>Member:</p> <ul style="list-style-type: none"><li>(1) Turn in a complete application package to their unit ESO</li></ul> <p>ESO:</p> <ul style="list-style-type: none"><li>(1) Review all applications, ensures completeness</li><li>(2) Arrange officer interview panels</li></ul> <p>Member:</p> <ul style="list-style-type: none"><li>(1) Interviewed by panel</li></ul> <p>ESO:</p> <ul style="list-style-type: none"><li>(1) After interview, ESO forwards applications to Coast Guard Recruiting Command (CGRC) before published deadline</li></ul> <p>CGRC:</p> <ul style="list-style-type: none"><li>(1) Review each application for eligibility submission to selection panel.</li><li>(2) Submit application packages to selection panel</li></ul> <p>Selection Panel:</p> <ul style="list-style-type: none"><li>(1) Meet and review applications</li><li>(2) Submit selections to CGRC</li></ul> <p>CGRC:</p> <ul style="list-style-type: none"><li>(1) Announce, by message board, applicants selected for program</li><li>(2) Inform members not selected for program by mail</li><li>(3) Provide Travel Order Number (TONO) for ROCI orders and assignments via message</li></ul> <p>Member:</p> <ul style="list-style-type: none"><li>(1) Attend training as directed</li></ul>
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## Direct Commission Officer Accession Programs (Continued)

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### References

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, CONDTINST M1000.6A  
Coast Guard Recruiting Manual, COMDTINST M1100.2D

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### Additional Information

Officer Programs: <http://www.gocoastguard.com/officerindex.html>  
Direct Commission Programs:  
<http://www.gocoastguard.com/dc/dcindex.htm>

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## Officer Candidate School (OCS) and OCS Programs

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### **General Information**

Officer Candidate School (OCS) is a 17-week long commissioning program for those who want to become commissioned officers in the Coast Guard. OCS graduates receive either a reserve or temporary commission, depending on the individual's qualifications.

OCS is held at the United States Coast Guard Academy in New London, Connecticut.

In addition to OCS, several other options are available to enlisted reservists seeking commissioning programs. The specialized OCS opportunities include:

- (1) College Student Pre-Commissioning Initiative
- (2) Pre-Commissioning Program for Enlisted Personnel
- (3) Blue 21 Guaranteed Flight Initiative
- (4) Aviation Candidate Program

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### **Officer and Enlisted Applicants (OCS only)**

Enlisted reserve personnel are allowed to apply for OCS. Candidates that have 4 or more years of service and are E-5 and above will receive a temporary commission.

All officer candidates serving in pay grade up to E-4 temporarily advance to E-5 while in OCS.

Upon commissioning, enlisted members will be discharged from their enlisted status and commissioned as a Coast Guard Officer.

Commissioned officers in the Coast Guard or Coast Guard Reserve are not eligible to apply if they are on the Active Duty Promotion List (ADPL). If a reserve officer is on the Inactive Duty Promotion List (IDPL), they may apply for the program, provided a conditional resignation approved by the Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) is included in the application.

Graduates of OCS have a three-year active duty obligation.

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## Officer Candidate School (OCS) and OCS Programs (Continued)

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### **Application**

All applicants are required to meet established age, education, citizenship, and health standards. Applicants must also complete a detailed application package, pass a personal interview, and be selected by a panel of Coast Guard members.

Application packages and complete requirements are available online.

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### **Academics and Training (OCS only)**

Topics covered include:

- (1) Customs and Courtesies
  - (2) Military Drill
  - (3) Military Justice
  - (4) Roles and Missions of the Coast Guard
  - (5) Coast Guard History
  - (6) Coast Guard Regulations and Policies
  - (7) First Aid/CPR
  - (8) Survival Swimming
  - (9) Leadership
  - (10) Reserve Programs
  - (11) Basic Seamanship
  - (12) Small Arms Training
  - (13) Navigation
- 

### **College Student Pre-Commissioning Initiative (CSPI)**

The College Student Pre-Commissioning Initiative (CSPI) is a scholarship program for college sophomores. Reservists may apply, as long as they are in their sophomore year of college. This program provides students with full payment of tuition, fees, and textbooks, as well as provides the student with a salary, medical insurance, and other benefits during their junior and senior years of college. Selected students work at a local recruiting office and attend boot camp during the first summer of enrollment.

After college graduation, the applicant is sent to OCS. Upon completion of OCS, the member is commissioned and serves a minimum of three years on active duty.

Application packages and complete requirements are available online.

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## Officer Candidate School (OCS) and OCS Programs (Continued)

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### **Pre-Commissioning Program for Enlisted Personnel (PPEP)**

The Pre-Commissioning Program for Enlisted Personnel (PPEP) allows enlisted personnel to complete their Bachelor's degree, attend OCS, and receive a commission in the Coast Guard. The Coast Guard will pay all tuition, books, and applicable fees in addition to regular pay and allowances. Reservists E-4 and above on active duty are eligible to apply.

Upon graduation, the applicant will attend OCS. After completing OCS and receiving a temporary or reserve commission, the graduate may be assigned to a ship, flight school, or an ashore billet. Assignments are based on the needs of the Coast Guard.

Application packages and complete requirements are available online.

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### **Blue 21 Guaranteed Flight Initiative**

The Coast Guard's BLUE 21 Guaranteed Flight Initiative allows selected personnel to attend OCS and, upon completion, earn either a reserve or temporary commission, and report directly to Naval flight training in Pensacola, Florida. After flight training, members will be designated as Coast Guard Aviators and receive orders to Coast Guard aviation billets.

The Coast Guard will only accept applications from current or former students of colleges and universities that meet specific criteria. Candidate must have a degree in an aeronautical/aviation/aerospace degree field, or a technical/analytical degree field.

This program is also open to individuals that are interested in applying to the Coast Guard's scholarship program, the CSPI, and meet the requirements for college/university and major.

Reservists are welcome to apply, provided all application criteria are met.

Application packages and complete requirements are available online.

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## Officer Candidate School (OCS) and OCS Programs (Continued)

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### **Aviation Candidate Program (AVCAD)**

The Aviation Candidate Program (AVCAD) is a program for active duty and reserve enlisted personnel interested in becoming Coast Guard aviators. Selected personnel will attend OCS and, upon completion, earn either a reserve or temporary commission, and report directly to Naval flight training in Pensacola, Florida. After flight training, members will be designated as Coast guard Aviators and receive orders to Coast Guard aviation billets.

Members who do not complete OCS will be returned to their previously held enlisted rank and rating. Members who do not complete flight training will be assigned to other Coast Guard officer billets.

Consideration and selection for this program is not based on the applicant's college degree or course of study.

Application packages and complete requirements are available online.

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### **Application Chain of Responsibility**

Member:

- (2) Turn in complete application package to unit Education Services Office (ESO)

ESO:

- (3) Review all applications, ensure completeness
- (4) Arrange officer interview panels

Member:

- (2) Interviewed by panel

ESO:

- (2) After interview, ESO forwards applications to Coast Guard Recruiting Command (CGRC) before published deadline

CGRC:

- (3) Review each application for eligibility submission to selection panel
  - (4) Submit application packages to selection panel
-

## Officer Candidate School (OCS) and OCS Programs (Continued)

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**Application Chain  
of Responsibility  
(continued)**

Selection Panel:

- (1) Meet and review application packages

CGRC:

- (4) Announce, by message board, applicants selected for program
- (5) Inform members not selected for OCS by mail

Member:

- (1) Attend OCS as ordered
- 

**References**

Coast Guard Recruiting Manual, COMDTINST M1100.2D  
Coast Guard Personnel Manual, COMDTINST M1000.6A

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**Additional  
Information**

Direct Commission Programs:

<http://www.gocoastguard.com/dc/dcindex.htm>

OCS Programs: <http://www.gocoastguard.com/dc/DCPrograms/ocs.htm>

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## United States Coast Guard Academy

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### General Information

The United States Coast Guard Academy (USCGA) provides a four-year Bachelor of Science program with full scholarship for each individual. Each graduating cadet earns a commission in the regular Coast Guard as an Ensign.

Upon graduation and commissioning, the active duty obligation is five years.

The USCGA is located in New London, Connecticut.

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### Application

Enlisted reservists are allowed to apply for admission to the Academy.

All eligibility requirements must be met per the Personnel Manual.

There is no distinction made between reservists, active duty prior-enlisted personnel, or civilian applicants.

Visit the web page listed below for complete application information.

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### References

Coast Guard Recruiting Manual, COMDTINST M1100.2D  
Coast Guard Personnel Manual, COMDTINST M1000.6A

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### Additional Information

USCGA: <http://www.cga.edu>

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## Chapter 3 – Training and Evaluation

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## Individual Development Plan (IDP)

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### **General Information**

An Individual Development Plan (IDP) is an employee's written plan for obtaining and developing knowledge, skills, and competencies.

The IDP helps Coast Guard members to:

- (1) Improve performance in current work assignment
  - (2) Assist in acquiring competencies for career development
  - (3) Prepare for another job or position
  - (4) Prepare for increased responsibility
- 

### **Individual Development Plan (IDP)**

The IDP is a way for members to organize development experiences and goals. The IDP provides a systematic way for all members of the Coast Guard to build on strengths and overcome weaknesses as individuals, improve job performance and pursue career goals.

Reservists are responsible for drafting the initial IDP, meeting with supervisors, Career Development Advisors (CDA) or other career development personnel, finalizing the plan, and taking full responsibility to complete developmental activities.

Supervisors are responsible for educating reserve subordinates on the IDP process and encouraging its use. Working with each member, supervisors determine competencies and goals, seek appropriate resources needed for successful development, encourage and provide feedback as the member meets individual goals, and help create new training objectives as former ones are met.

The IDP gives supervisors a clear guide for working towards long-term goals and a chance to channel the member's efforts in ways that help the Coast Guard achieve mission goals. It is also a tool for assessing training needs and training plans.

While voluntary, units, supervisors, and reservists are highly encouraged to use the IDP.

Individual career counseling remains a command responsibility, while the commands are counseled by regional CDAs.

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## Individual Development Plan (IDP) (Continued)

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**Career Development Advisor (CDA)** A Career Development Advisor (CDA) coordinates career development programs for members and provides a necessary flow of communication to each commanding officer and officer in charge of career planning, development, leadership initiatives, and policies and programs affecting both active and reserve personnel.

CDAs are well trained in how to develop an IDP. They emphasize the importance of the professional and personal development of all Coast Guard personnel.

While it is up to each command to individually counsel members, CDAs provide unit training as time and funding permit.

CDA personnel are experts in the following areas:

- (1) Career Goal Setting
- (2) Reserve Programs
- (3) Mentoring
- (4) Leadership Development
- (5) Education Opportunities
- (6) Tuition Assistance
- (7) Enlisted Ratings
- (8) Advancement
- (9) Enlisted to Officer Programs
- (10) "A" Schools
- (11) Reenlistment Programs
- (12) Separations
- (13) Retirement Programs
- (14) Veterans Benefits

CDAs are located at each ISC (pf), Headquarters Support Command, and the Coast Guard Institute. They work in partnership with Commandant designated Command Master Chiefs (CMC), rating and force managers, collateral duty CMCs, and Education Services Officers (ESO).

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**Education Services Officer (ESO)** Education Services Officers (ESO) are located at every ISC (pf) and at other units as a collateral duty. Once a member has written an IDP and determined the appropriate actions needed to reach said goals, an ESO can provide information on civilian education opportunities and non-resident correspondence courses.

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## Individual Development Plan (IDP) (Continued)

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### Creating an IDP

The five basic steps to creating an IDP:

- (1) Conduct a Self-Assessment
  - (2) Meet with a Career Counselor or Advisor
  - (3) Meet with Supervisor
  - (4) Implement Plan
  - (5) Follow-up with Supervisor
- 

### Record Keeping

The standard IDP form (CG-6021) should be used when outlining and creating plans.

Supervisors or a Professional Development Board (PDB) files the Individual Development Plans. The IDP is an informal tool that only needs to be filed in personnel folders. It is not recorded in Direct Access or another public record system. Reservists should review and modify their IDP every six months.

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### References

Reserve Policy Manual, COMDTINST M1006.28A  
Coast Guard Individual Development Plan, COMDTINST 5357.1  
Career Development Advisor Program, COMDTINST 1040.4C

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### Additional Information

Coast Guard Career Central: <http://www.uscg.mil/hq/g-w/g-wt/g-wt/career/index1.htm>  
IDP Forms and Information: <http://www.uscg.mil/hq/g-w/g-wt/g-wt/idp/index.htm>

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## Correspondence Courses

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### **General Information**

A list of non-resident correspondence courses offered by the Coast Guard Institute is available online or through the servicing Education Services Officer (ESO).

Reservists may earn retirement points for completed courses. The Coast Guard determines the actual retirement point value of the course.

End of course exams are either self-paced or timed but are always proctored. A student may only be enrolled in a maximum of three courses at one time. Courses must be completed within 36 months from course start date.

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### **Member Eligibility**

Active duty, reservists, retirees, auxiliarists, and Coast Guard civilian employees are eligible for unclassified non-resident courses.

Coast Guard civilian employees are eligible for all unclassified courses, though a written explanation must accompany any request. All requests will be evaluated for approval on an individual basis.

Only active duty and reserve personnel may enroll in classified courses on a need-to-know basis and when properly cleared. Members should contact their servicing ESO for information.

---

### **Correspondence Course Chain of Responsibility**

Member:

- (1) View Coast Guard Institute course list
- (2) Contact servicing ESO
- (3) Request course material desired—consult servicing ESO for preferred application method

ESO:

- (1) Forward course request to Coast Guard Institute

Coast Guard Institute:

- (1) Forward course material to member within 6 weeks of order from ESO (Active-material sent to unit, Reserve-material sent to home address)
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## Correspondence Courses (Continued)

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### Correspondence Course Chain of Responsibility (continued)

Member:

- (1) Schedule test date with ESO
- (2) Study!

ESO:

- (1) Administer examination
- (2) Forward completed answer sheet to Coast Guard Institute

Coast Guard Institute:

- (1) Send letter indicating results to ESO within 3 weeks of grading

ESO:

- (1) Log test results
  - (2) Forward letter to member
- 

### Correspondence Course Disenrollment

There are two types of disenrollment:

- (1) Automatic
- (2) Requested

Personnel may be automatically disenrolled for the following reasons:

- (1) Satisfactory course completion
- (2) Failure to complete the course within the 36-month maximum time limit
- (3) Course or course edition becomes obsolete

Disenrollment may also be requested for the following reasons:

- (1) Discharge from the Coast Guard
  - (2) Release from active duty
  - (3) Transfer to the IRR
  - (4) Student or command requested disenrollment for other reasons
- 

### Course Completion Letters

Course completion letters are sent employees of the Coast Guard upon completion of a non-resident training course. All letters for reserve and active duty members are sent to the unit. After command endorsement, a copy of the letter is filed in the student's Personnel Data Record, and the original is mailed to the student. For reservists, the letter will also indicate the number of retirement points earned.

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## Correspondence Courses (Continued)

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<b>Course Completion Letters (continued)</b>	Course completion letters for retired and civilian members are available through the servicing ESO. Letters for members of the Coast Guard Auxiliary are sent to the Auxiliary Director. It is the responsibility of the Director to forward the letter to the member.
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<b>References</b>	ESO Procedure Guide
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<b>Additional Information</b>	Coast Guard Institute: <a href="http://www.uscg.mil/hq/cgi/index.html">http://www.uscg.mil/hq/cgi/index.html</a> Course Listing: <a href="http://www.uscg.mil/hq/cgi/courses/courses.html">http://www.uscg.mil/hq/cgi/courses/courses.html</a> Correspondence Courses: <a href="http://www.uscg.mil/hq/cgi/esoguides.html">http://www.uscg.mil/hq/cgi/esoguides.html</a>
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## Resident Training

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### **General Information**

Resident training is formal instruction at a location away from the normal duty station. Reservists may attend on either Active Duty for Training-Annual Training (ADT-AT), -Other Training Duty (ADT-OTD), or Inactive Duty Training (IDT) orders, though ADT orders are normally used. Resident training should target skills that cannot easily be obtained through on-the-job training or correspondence courses.

Coast Guard Class “A” courses provide essential rating training and the basic technical knowledge and skills required for entry-level job performance. Class “A” school graduates are apprentices and require on-the-job training at their first units.

Coast Guard Class “C” courses are short-term (less than 20 weeks) training designed to provide advanced knowledge and teach specialized skills. Courses prepare members for specific jobs and missions that cannot easily be obtained through other methods of instruction.

Course schedules are published each October in the “Class Convening Schedule for Coast Guard Class “A” and “C” Resident and Exportable Training Courses” (COMDTNOTE 1540). This may be found on the Training Quota Management Center (TQC) web site or through unit education and training officers.

Some Headquarters, Area, or Maintenance and Logistics Command (MLC) program managers publish additional resident training opportunities, including exportable “road show” training.

Quotas and funds will be allocated to members and units with the highest training priorities.

---

### **Additional Information**

Reservists attending “C” schools do not take away seats from active duty members. The Coast Guard Reserve invests in resident training and pays for member’s salary, travel, and per diem costs. The student load is based on both active and reserve needs that are estimated before the start of the training year.

Unit education and training officers maintain up-to-date training schedules for all formal instruction.

Reservists should sign up for resident training at least 12 weeks in advance of the session through their unit education and training officer.

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## Resident Training (Continued)

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### **Additional Information (continued)**

Course pre-requisites and special information can be found in the “Course Description” contained within the Electronic Training Request (ETR). Unit training coordinators ensure students are compliant with all pre-requisites.

The ETR is the preferred method for requesting training. Units or members without internet access may request training using the Short Term Resident Training Request (CG-5223) or Class “A” School Training Request (CG-5286) forms.

---

### **“C” Schools**

All Coast Guard “C” schools are open to reservists, though some courses are harder to get in to than others. Factors affecting selection include:

- (1) Eligibility/pre-requisites
- (2) Command approval
- (3) Overall demand
- (4) Unit quota for course
- (5) Duration of course
- (6) Availability of funding from servicing ISC (pf)

Some “C” schools are designated “Reserve Only” because the courses are no more than two-weeks long. These classes satisfy the ADT-AT requirement and do not require additional time away from the civilian workplace. The TQC maintains the list of these concentrated training opportunities.

---

### **Active Duty for Training (ADT)**

Often members request “C” schools to satisfy their ADT-AT requirements. If a “C” school is less than 12 days in duration, it can be used to fulfill the service obligation. If a school is longer than 12 days, it might not be considered ADT-AT. Requests for courses that require more than 12 days of active duty or requests for reservists who have already performed ADT-AT for the fiscal year are approved only after the ISC (pf) ensures the availability of funds. This active duty in excess of the annual requirement is called Active Duty for Training-Other Training Duty (ADT-OTD) if training is specialty or position

related.

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## Resident Training (Continued)

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### Active Duty for Training (ADT)

Members who have not completed their ADT-AT taking courses longer than 12 days may have the training satisfy the ADT requirement. ADT-AT orders will be issued for the first 12 days of training, then a set of ADT-OTD orders shall be issued for the remainder of the training days.

Each ISC (pf) can approve ADT-ODT requests for up to 30 days per reservist, per fiscal year.

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### Course Locations

Most courses convene at the Coast Guard Academy, Training Center (TRACEN) Yorktown, TRACEN Petaluma, TRACEN Cape May, Aviation Technical Training Center Elizabeth City, Aviation Training Center Mobile, or commercial training locations.

Exportable or “road show” courses are held at local units.

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### Training History

Commands and supervisors may check an individual’s training history through Direct Access (DA).

Log on to DA > Home > Self Service > Self Service for Commands > Use > Student Training Summary

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### Application Chain of Responsibility

Member:

- (1) Select desired training course
- (2) Fill out CG-5223
- (3) Submit form to supervisor

Supervisor:

- (1) Endorse request
- (2) Forward to unit training coordinator

Unit Training Coordinator:

- (1) Run training query
- (2) Request Training Enrollment

- (3) Locate and identify course, dates, sessions available
  - (4) Complete ETR in Direct Access for member
- 

## Resident Training (Continued)

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### Application Chain of Responsibility (continued)

#### TQC:

- (1) Process member for course enrollment
- (2) If resident training is TQC managed, notify unit on reservists' selection no later than eight weeks before class starts

#### Unit:

- (1) Inform member of training approval

#### Member:

- (1) Start ADT-AT or ADT-OTD request process
  - (2) After approval and order issuance, attend training as directed
- 

### References

Reserve Policy Manual, CONDTINST M1001.28A  
COMDTNOTE 1540

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### Additional Information

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
TQC: <http://www.uscg.mil/hq/tqc/>  
“C” School Schedule:  
<http://www.uscg.mil/hq/tqc/1540TableofContents.htm>  
Reserve Training and Education Opportunities:  
<http://www.uscg.mil/hq/g-w/g-wt/Learning/Reserve.htm>

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## Officer Evaluation Reports (OER)

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### General Information

The mission of the Officer Evaluation Reporting System (OERS) is to provide information to selection boards and assignment managers for use in making personnel management decisions. The Officer Evaluation Report (OER) is an assessment tool for rating officials to give shape and direction to the rated officer's performance and potential.

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### Officer Rating Chain

The rating chain provides the assessment of an officer's performance and value to the Coast Guard through a system of multiple evaluators and reviewers presenting independent views and ensuring accuracy and timeliness. The OER reinforces decentralization by placing responsibilities for development and performance evaluation at the lowest levels within the command structure.

The rating chain consists of the following members:

- (1) Reported-On Officer (ROO)
  - (2) Supervisor
  - (3) Reporting Officer
  - (4) Reviewer
- 

### Annual and Biennial Reports

Most Reserve OERs are biennial, due in even years, except when specified in the Coast Guard Personnel Manual for promotion, transfer, or other selection board consideration. O-1, O-2, and O-6 Reserve OERS are annual.

OERs for officers on an annual submission schedule are required if more than six months (182 days) have elapsed since the ending date of the last regular OER or the date reported present unit, whichever is later.

OERs for officers on a biennial submission schedule are required if more than 12 months have elapsed since the ending date of the last regular OER or the date reported present unit, whichever is later.

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## Officer Evaluation Reports (OER) (Continued)

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- Annual and Biennial Reports (continued)** Reserve biennial or annual OER submission is optional (waivers not required) if:
- (1) A regular OER (or a special Active Duty Special Work OER whichever counts for continuity) was submitted within 6 months prior to the scheduled submission date
  - (2) A regular OER will be submitted within the following 6 months of the scheduled due date
  - (3) The Reported-On Officer under permanent change of station (PCS) orders has been observed at the new unit for less than 6 months

Reserve Reported-On Officers who are on a biennial schedule and are in zone for promotion on the Inactive Duty Promotion List (IDPL) during an odd numbered year shall complete a Special OER for that year to document all performance since the last regular OER for board consideration. These OERs should not be delayed past the normal submission month (i.e. March for Commanders, April for Lieutenant Commanders). Extensions will not be granted.

See chapter 10.A of the Personnel Manual, COMDTINST M1000.6(series) for complete information on OER submissions.

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### OER Schedule

GRADE	IDPL
Captain	April (Annual)
Commander	March (Biennial)
Lieutenant Commander	April (Biennial)
Lieutenant	May (Biennial)
Lieutenant (Junior Grade)	July (Annual)
Ensign	March (Annual)
Chief Warrant Officer (W4)	April (Biennial)
Chief Warrant Officer (W3)	July (Biennial)

Chief Warrant Officer (W2)

June (Biennial)

## Officer Evaluation Reports (OER) (Continued)

### OER Forms

The OER is a series of forms, CG-5310, used to document Coast Guard officers' performance and potential.

GRADE	FORMS
Captain	CG-5310 with page 3C
Commander	CG-5310 with page 3B
Lieutenant Commander	CG-5310 with page 3B
Lieutenant	CG-5310 with page 3B
Lieutenant (Junior Grade)	CG-5310 with page 3A
Ensign	CG-5310 with page 3A
Chief Warrant Officer	CG-5310 with page 3A

### OER Timeline

Twenty-one days before the end of the reporting period; the ROO submits a list of significant accomplishments during the period, supporting documents, administrative data required for OER Section 1, and a complete OER page 4 to Supervisor.

Ten days after the reporting period; Supervisor sections of OER due to Reporting Officer.

Thirty days after the reporting period; Supervisor and Reporting Officer sections are due to Reviewing Officer. Reviewer sends completed OER to OER Administrator.

Forty-five days after the reporting period; OER due to Coast Guard Personnel Command (CGPC) Reserve Personnel Management Division (rpm) or Officer Personnel Management (opm-3) for review and entry into member's official record.

Ninety days after the reporting period; ROO contacts CGPC-opm-3 or

CGPC-rpm on non-receipt of official copy of OER.

Twenty-one days after receipt of official copy of OER; ROO may submit an OER Reply to Supervisor.

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## **Officer Evaluation Reports (OER) (Continued)**

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### **Officers on Active Duty Special Work (ADSW)**

Reserve officers on Active Duty for Special Work (ADSW) submit OERs for continuity purposes.

If the ADSW orders are for a period of six months or less, performance for the entire period of ADSW shall be included in the Reported-On Officer's next Inactive Duty Training/Active Duty for Training (IDT/ADT) biennial/annual OER. The ADSW supervisor and reporting officer should provide the IDT/ADT unit supervisor with a draft OER form CG-5310 Sections 1-11. The draft may be handwritten and shall include marks and comments for the period of observation. Bullet statements may be used. The ADSW supervisor and reporting officer shall sign the draft OER and forward it to the IDT/ADT unit supervisor. A copy of the draft OER may be provided to the Reported-On Officer.

If the ROO was in the IRR prior to the ADSW assignment an ADSW OER shall be completed by the ADSW rating chain for the period of active duty only.

If the ADSW orders are for a period exceeding six months, performance shall be documented on OER form CG-5310 upon completion of the ADSW assignment.

An ADSW OER is required if the Reported-On Officer has changed or detached from the unit and more than six months have elapsed since the ending date of the last ADSW OER or the date reported to the ADSW assignment, whichever is later.

An ADSW OER may be submitted if the ROO is in or above zone for promotion. All ADSW performance completed up to the ROO's regular OER submission month shall be documented.

ADSW over six months in duration may be included in the ROO's regular biennial/annual IDT/ADT OER or a separate ADSW OER may be submitted.

ADT, ADSW, and IDT OERs are prepared on Coast Guard Reserve personnel and should be mailed to CGPC-rpm.

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## Officer Evaluation Reports (OER) (Continued)

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### **Officers on Extended Active Duty (EAD)**

Reported-On Officers on ADSW assignments and immediately brought on Extended Active Duty (EAD) contract in the same assignment may defer submitting an OER until their next regular OER submission date (following active duty submission schedule). The following requirements must be met in order to defer OER submission:

- (1) There is no break in service; the EAD contract must begin the day after the ADSW assignment ends
- (2) There is no change in the description of duties and reporting officer
- (3) The reporting period does not extend beyond 18 months for annual reports, or 12 months for semiannual reports

Reported-On Officers follow the active duty OER schedule guidelines once on an EAD contract.

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### **Officers Recalled to Active Duty**

If the Reported-On Officer is involuntarily mobilized to perform active duty of any duration at their permanent SELRES unit (or previous ADSW unit if there is no break in service), then performance of the mobilization duty shall be included in the ROO's regular OER. If the Reported-On Officer was in the IRR in a non-drilling status prior to reporting to the mobilization assignment, then in all cases (for voluntarily recall of any length) a concurrent OER shall be completed by the mobilization units rating chain only for the period of active duty recall. Active Duty promotion List (ADPL) submission schedules begin to apply after six months of continuous active duty. IDPL submissions schedules commence again upon demobilization.

If the ROO is mobilized to perform active duty for a period of less than 92 days at a unit other than the permanent SELRES/IRR unit, the

supervisor and reporting officer of the mobilization unit are responsible for providing the SELRES/IRR unit with a draft OER. The draft may be handwritten and shall include marks and comments for the period of observation. Bullet statements may be used. The mobilization supervisor and reporting officer shall sign the draft OER and forward it to the SELRES/IRR unit supervisor. A copy of the draft OER may be provided to the Reported-On Officer.

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## Officer Evaluation Reports (OER) (Continued)

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### **Officers Recalled to Active Duty (continued)**

If the Reported-On Officer is involuntarily recalled to active duty at a unit other than their permanent unit for 92 days or more, then OER submission criteria for a Permanent Change of Station (PCS) transfer shall apply. The permanent SELRES unit shall prepare a PCS departure OER (if required) and the mobilization OER counts for continuity, even though the officer is not removed from their SELRES assignment. ADPL submission schedules apply.

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### **Individual Ready Reserve (IRR)**

A continuity OER shall be submitted for officers assigned to the Individual Ready Reserve (IRR). The OER shall encompass the entire period the officer was in the IRR. For officers being considered for promotion during a particular year (even if the ROO is still in the IRR), a continuity OER shall be submitted and shall not be delayed past the scheduled submission date.

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### **OER Tracking**

Individuals can check the status of validated OERs in Direct Access (DA).

Home > Self Service > Employee > View > My Employee Reviews

DA will show all the fully evaluated OERs and those entered into a member's Headquarters record. OERs will not appear in DA until it has been fully validated; it may have been received but is being processed.

If more than 90 days have elapsed since the end of the period, and the OER is not accessible through DA, members may send an e-mail to

[oyer@ballston.uscg.mil](mailto:oyer@ballston.uscg.mil) requesting an update.

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**Additional OER Considerations**

There is no intention to make the OER "gender neutral." The Coast Guard recommends limited use of all pronouns, where appropriate, to save space. However, there are restrictions upon emphasizing gender when documenting performance or behavior in an OER. Members of the rating chain shall not "expressly evaluate, compare, or emphasize gender, religion, color race or ethnic background."

Additionally, it is prohibited to place emphasis "upon a third party by gender, religion, color, race or ethnic background (e.g., Catholic priest, African-American female civilian)."

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**Officer Evaluation Reports (OER) (Continued)**

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
 Coast Guard Personnel Manual, COMDTINST M1000.6A  
 Schedule of Officer Personnel Boards and Panels, COMDTINST 1401.5Z  
 Training and Educational Manual, COMDTINST M1500.10B  
 ALCOAST 077/04  
 Coast Guard Officer Career Development Guidebook

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**Additional Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
 Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
 Direct Access: <http://www.uscg.mil/hq/psc/cghrms/>  
 PSC Topeka: <http://www.uscg.mil/HQ/PSC/>  
 CGPC-opm: <http://www.uscg.mil/hq/cgpc/opm/opmmain.htm>  
 CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>  
 Career Development Guidebook: <http://www.uscg.mil/hq/g-w/g-wt/g-wtl/ocgb/book.pdf>

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## Enlisted Employee Review System

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### **General Information**

Enlisted Employee Review System (EERS) is the enlisted performance evaluation system. EERS emphasizes performance using periodic performance feedback as the basis for formal evaluation reports.

The evaluations reflect how well members do their jobs and the qualities brought to the job. Performance is important for mission accomplishment, development of skills and leadership abilities, and determination of advancement.

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### **Enlisted Rating Chain**

The rating chain assesses an enlisted member's performance and value to the Coast Guard through a system of multiple evaluators who present independent views and thus ensure accurate, prompt, and correct reporting. It reinforces decentralization by placing responsibilities for development and performance review at lower levels within the command structure. It ensures the evaluatee is evaluated on the required period ending date and the employee review is based on how the member performed in each competency consistently throughout the period, except for conduct, which must be adhered to every day.

The rating chain consists of the following members:

- (1) Supervisor
- (2) Marking Official
- (3) Approving Official

Each rating official shall review and correct any inconsistencies found in employee reviews.

Officials shall also hold the next lower supervisory level accountable for their employee reviews by observing the accuracy and quality of the employee reviews they submit, and by reporting the same on their EER.

Upon reviewing the Approving Official's recommendations, the Supervisor must counsel the evaluatee.

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**Enlisted Employee Review System (EERS)**

The employee review is designed to inform members how they are performing compared to written standards. The evaluation form requires few or little supporting remarks and should explicitly cover all performance factors for each evaluatee. The rater may use the employee review as a tool in counseling the evaluatee.

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**Enlisted Employee Review System (Continued)**

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**Enlisted Employee Review System (EERS) (continued)**

The employee review is not only used to document an individual's past performance, but more importantly to provide a road map for future improvement.

The Enlisted Employee Review System (EERS) serves several specific purposes:

- (1) To set standards to evaluate the performance and behavior of all enlisted members
- (2) To inform enlisted members of the performance standards they will be measured against
- (3) To provide feedback to enlisted members on how well they are measuring up to the standards
- (4) To capture a valid, reliable assessment of enlisted members' performance so the Coast Guard may advance and assign members with a high degree of confidence
- (5) To provide critical information affecting discharges, re-enlistments, good conduct, advancement eligibility, and reductions in rate

The Enlisted Employee Review Management System (EERMS) is an automated system assisting the Human Resources Directorate (G-W) monitor EERS performance. EERMS provides system feedback, enforces enlisted employee review discipline, and serves as the database of official marks for each member.

**Enlisted Evaluation Schedule**

The evaluations for the different pay grades are due on the last day of the month indicated.

<b>PAYGRADE</b>	<b>MONTH DUE</b>
E-1	February
E-2	February
E-3	January
E-4	March
E-5	April
E-6	May
E-7	September
E-8	November
E-9	June

**Enlisted Employee Review System (Continued)****Enlisted Evaluation Timeline**

Evaluatees submit a list of significant achievements or aspect of performance midway through the marking period and not later than 14 days before the end of the marking period.

The Supervisor routes the completed review to the Marking Official no later than 9 days prior to the period ending date, including supporting comments for any recommended supporting remarks. Supervisors enter the marks into Direct Access (DA).

The Marking Official sends the completed employee review to the Approving Official not later than 5 days after the employee review period ending date.

The Approving Official completes the evaluation and updates the marks in DA.

After an Approving Official verifies an Employee Review, a Member Counseling Report is printed. The Supervisor counsels the member and reviews the marks and Reviewer Comments (page 7). The member and supervisor must sign the report, also entered in DA.

The evaluated member may review their evaluation through Direct Access no later than 30 days following the employee review period

ending date.

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**Enlisted Members on Active Duty Special Work (ADSW) or Extended Active Duty (EAD)**

Enlisted personnel on Temporary Duty (TDY) or Active Duty Special Work (ADSW) less than 92 days must have the commanding officer of the duty unit provide, in writing, supporting documentation for input in the member's next regular employee review when an evaluatee completes active duty.

For reservists on active duty (Title 10 or short-term ADSW) 92 days or longer at a unit other than their permanent duty station, the temporary duty unit has the responsibility to complete the member's regularly scheduled EER.

When a member is on Extended Active Duty (EAD) or Title 10 recall, the member is considered a reservist and therefore should still only be marked once a year as per the submission schedule.

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## **Enlisted Employee Review System (Continued)**

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**Enlisted Members on Active Duty (continued)**

Any active duty period greater than 140 days at a unit other than the member's permanent duty station is considered, for EER purposes, a permanent change of station transfer.

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**Evaluation Policy**

Each commanding officer or officer-in-charge ensures all enlisted members under their command receive accurate, fair, objective, and timely employee reviews. To this end, the Coast Guard had made enlisted performance criteria as objective as possible, within the scope of jobs and tasks enlisted personnel perform. In using the Enlisted Employee Review System, strict and conscientious adherence to the specific wording of standards is essential to realizing the purpose of the employee review process.

Members are divided into three pay grade groups:

- (1) Master, Senior, and Chief Petty Officers (E-9, E-8, E-7)
  - (2) Petty Officers (E-6, E-5, E-4)
  - (3) Non-Rated personnel (E-3, E-2, E-1)
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**Competencies**

Competencies are the individual elements on which the Coast Guard evaluates its enlisted personnel. The four major categories of

performance are:

- (1) **Military:** Measures a member's ability to bring credit to the Coast Guard through personal demeanor and professional actions
- (2) **Performance:** Measures a member's willingness to acquire knowledge and the ability to use knowledge, skill, and direction to accomplish work
- (3) **Professional Qualities:** Measures the qualities the Coast Guard values in its people
- (4) **Leadership:** Measures a member's ability to direct, develop, influence, and support others performing work

Each competency is defined in terms of three performance standards: low, middle, and high. These standards are not the same for each pay grade group. The higher the pay grade group, the higher the standards. All raters should mark each evaluatee against written standards, not against others in the same rate or rating.

## Enlisted Employee Review System (Continued)

### Marks

MARK	EXPLANATION
1	Unacceptable-Member did not meet all the written performance standards in the "2" level and the rater considered the impact severely detrimental to the organization or to others
2	Poor-Member met all the written performance standards in this level
3	Below Standard-Member did not meet all the written performance standards in the "4" block
4	Average-Member met all the written performance standards for this level and none in the "6" level
5	Above Average-Member met all the written performance standards in the "4" level and at least one of those in the "6" level

6	Excellent-Member met all the written performance standards for this level and did not exceed any of them
7	Superior-Member met all the written performance standards in the "6" level and exceed at least one of them

All marks of 1, 2, or 7 and unsatisfactory or good conduct must be supported and documented on a "page 7" report.

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**Advancement  
Recommendation**

While the rating chain must consider past performance, it must also consider and base the recommendation on the member's potential to perform satisfactorily the duties and responsibilities of the next higher pay grade, qualities of leadership, and adherence to the Coast Guard's core values. Each rating chain member must address this section independently every time they complete an employee review.

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## Enlisted Employee Review System (Continued)

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**Advancement  
Recommendation  
(continued)**

When completing the advancement recommendation section, members of the rating chain have the following two choices:

- (1) Recommended: the member is fully capable of satisfactorily performing the duties and responsibilities of the next higher pay grade. The rating chain should choose this entry regardless of the member's qualification or eligibility for advancement. If the member has met all eligibility requirements, choosing this value constitutes an official recommendation for advancement. Personnel E-6 and above must receive supporting remarks documenting their present and future leadership potential for greater responsibility
- (2) Not Recommended: the member is not capable of satisfactorily performing the duties and responsibilities of the next higher pay grade.

If a member receives a "Not-Recommended" mark, they must be properly counseled on the steps necessary to earn a recommendation

and prepare supporting remarks.

The decision on the advancement recommendation is final and may not be appealed. However, if the Approving Official learns new information, the recommendation may be changed.

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<b>Employee Reviews</b>	All employee reviews submitted on enlisted personnel E-6 and above are required to include supporting remarks documenting the individual's leadership potential along with the commanding officer's advancement recommendation. They must clearly identify the member's current and future potential for positions of greater responsibility.
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<b>EERS Forms</b>	The Personnel Service Center (PSC) has created Enlisted Employee Worksheets for those units without access to DA. Completed worksheets are forwarded to the member's designated approving official for final review and entry into Direct Access.
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## Enlisted Employee Review System (Continued)

### EERS Forms (continued)

FORM	PERSONNEL
CG-3788A	Employee Review Worksheet (Non-Rated)
CG-3788B	Employee Review Worksheet (Petty Officer)
CG-3788C	Employee Review Worksheet (Master, Senior, Chief Petty Officer)

### Employee Review Process

The rating chain will evaluate each enlisted member by the required period ending date to access his or her actual performance since the last recorded employee review. The rating chain shall base employee reviews on how the member performed in each competency consistently throughout the period, except for conduct that the member must adhere to every day. Normally, a single, isolated event (positive or negative) should not drastically affect the marks assigned during the

employee review period. However, the rating chain must consider the overall positive or negative impact of the event.

The rating chain uses employee reviews to evaluate enlisted members' performance of duties in any position or pay grade, whether in a specialty or not.

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### **Employee Review Summary**

The Employee Review Summary provides enlisted members with the ability to view their enlisted marks history. Members may view their evaluations through Direct Access.

Home > Self-Service > Employee > View > Employee Review Summary

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
ALCOAST 077/04

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### **Additional Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
Direct Access: <http://www.uscg.mil/hq/psc/cghrms/>  
PSC Topeka: <http://www.uscg.mil/HQ/PSC/>  
CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>

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## **No-Shows and Non-Participating Members**

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### **General Information**

An integral part of the reserve training program is compliant participation from the members. In order to make the reserve training system work it is imperative members attend all scheduled drills and satisfy annual requirements. Efficient management of reserve personnel is critical to force readiness. Without proper accountability and tracking procedures, the usefulness of our assets is greatly compromised. Guidelines have been set forth to assist units in managing reserve personnel. Units are responsible for tracking the status of its personnel.

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### **Participation Requirements**

Selected Reserve (SELRES) members must:

- (1) Complete Initial Active Duty for Training (IADT)
- (2) Report per orders
- (3) Attend 90% of scheduled, authorized paid Inactive Duty

- Training (IDT) drills per fiscal year
- (4) Satisfy the Active Duty for Training-Annual Training (ADT-AT) requirements
  - (5) Complete resident or correspondence courses required by the enlistment contract or commissioning program
  - (6) Answer official correspondence
  - (7) Complete the Annual Screening Questionnaire
  - (8) Notify the Coast Guard of changes to point of contact information, education or civilian employment, or incapacitation
  - (9) Maintain fitness and weight standards
  - (10) Maintain approved current physical and dental exams

Satisfactory performance means fulfilling contractual and training requirements. Satisfactory participation is a factor of performance and is reflected in a member's performance evaluations.

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**Unsatisfactory Participation**

Unsatisfactory participation is failure to comply with any contractual obligations or program requirements. SELRES members acquiring at least nine unexcused absences from scheduled training within a 12-month period or failing to meet standards prescribed for annual screening, training for advancement, or performance of duty is also considered unsatisfactory.

Commanding officers may take administrative actions when members fail to satisfy participation requirements.

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**No-Shows and Non-Participating Members (Continued)**

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**Excused Absences**

Members may be excused for missed drills if the absence is due to:

- (1) Illness or injury of the reservist
- (2) Serious or unusual hardship due to unforeseen emergency
- (3) Accident or illness of a family member requiring presence or other action by the reservist
- (4) Death or imminent death of a member of the immediate family

Members shall prove cause of absence if required to do so by an established authority.

Absences not listed above are not excused unless determined otherwise by the commanding officer or another delegated authority.

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**Events and Outcomes**

<b>Triggering Event</b>	<b>Outcome</b>	<b>Procedure</b>
Member does not show for scheduled drill (first offense) and has no valid excuse	Member counseled by supervisor	Document in Direct Access. Prepare Administrative Remarks form (CG-3307) after counseling session. If member is not available to acknowledge, send form by certified mail. Place member on performance probation. Counsel for duration of probationary period.
Member does not show for scheduled drill (subsequent offense)	Discharge procedure begins.	Document in Direct Access. Prepare Administrative Remarks form (CG-3307) after counseling session. If member is not available to acknowledge, send form by certified mail. Commanding officer is authorized to recommend discharge at any time during probationary period if member is not making an effort to overcome the deficiency.
Member does not show for scheduled drill (9th IDT missed) or does not perform ADT	Recoupment of SELRES bonuses and/or MGIB funds	Document in Direct Access. Submit bonus recoupment letter to Personnel Service Center-Separations, Entitlements, Debts, and Service Validation (PSC (SES)).
Member is recommended for discharge	Evaluation of circumstances and evidence is gathered	Members being process for discharge can be issued either honorable, under other than honorable, bad conduct, or dishonorable discharge for reason of misconduct. Units may contact CGPC-rpm for questions regarding discharge of reservists for cause of misconduct.

**No-Shows and Non-Participating Members (Continued)****Counseling and Documentation**

Commands shall monitor member participation and evaluate performance of prescribed training requirements to determine compliance. Every effort shall be made to correct performance deficiencies by timely counseling members not participating in a

satisfactory manner.

Commands shall document all counseling on CG-3307 forms and in Direct Access (DA).

Home > Develop Workforce > Plan Careers > Use > Employee Review

Counseling for unexcused IDT drill absences shall start with the first absence. The record of counseling will include:

- (1) Absences (number, dates, and reasons)
- (2) Member's general behavior and quality of work
- (3) A statement that counseling has been provided with the member's acknowledgement (when efforts to counsel the member in person are unsuccessful, remarks shall be mailed to the member's address on file)
- (4) Dates of next scheduled drill(s) with requirement for member to report
- (5) Proposed command action should member fail to report

Monitoring and correcting non-performance issues is a time-consuming process. Units are better served to motivate non-performers into complying with the mission requirements. Closure timelines vary by individual.

Lack of proper documentation will hinder the process and its fairness. Unit operational tempo and lack of experienced reserve personnel will decrease the effectiveness of disciplinary measures.

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### **Probation**

Performance probation is a grace period in which a member is allowed to improve performance and demonstrate rehabilitation. Probation lasts six months, beginning on the day of the first counseling session and member's acknowledgement of Administrative Remarks (CG-3307). If no observable progress made, commanding officers can terminate probation and proceed with other administrative actions.

If no other infractions occur after the 6-month probationary period, the member is evaluated like all other drilling members.

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## **No-Shows and Non-Participating Members (Continued)**

### **Compliance Measures**

Ready Reservists not fulfilling their statutory military service obligation (MSO) and whose participation has been unsatisfactory may be ordered involuntarily to active duty if they have not accumulated

more than 24 months of combined active service. Members shall be required to serve on active duty until their total service on active duty equals 24 months. Requests for active duty are submitted via the servicing ISC (pf) to the Office of Reserve Affairs (G-WTR).

Members may be ordered to Active Duty for Training-Annual Training (ADT-AT), regardless of length of prior combined active service, for a period of not more than 45 days. Requests for ADT-AT are submitted to the servicing ISC (pf).

If initial enlistments or other periods of military service expire before the end of the required periods of service, members shall be extended to accommodate the required active duty service.

Upon completion of required active duty service, members may be returned to their SELRES assignments, transferred to the Individual Ready Reserve (IRR), or may be discharged if at the end of their enlistment.

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<b>Delay and Hardship</b>	Individuals involuntarily ordered to active duty may request a delay in reporting. Reservists whose involuntary orders would result in extreme community or personal hardship shall report for duty, but may upon request, be transferred to the Standby Reserve, the Retired Reserve, or may be discharged. Documentation must accompany any hardship or delay requests. Refer to Department of Defense Directive 1200.7 for details.
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<b>Selected Reserve (SELRES) Transfer</b>	Members may be transferred or retained in the IRR for the balance of their statutory MSO if they have no remaining SELRES obligation and still possess the potential for useful service.
	Members of the SELRES who have fulfilled their MSO and whose participation has been unsatisfactory may be transferred to the IRR or Standby Reserve (Inactive Standby List) for the balance of their current service obligation if they possess the potential for useful service if mobilized. They may be discharged if they do not possess mobilization potential.

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## **No-Shows and Non-Participating Members (Continued)**

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<b>Processing of Orders and Failure</b>	When SELRES members are ordered to active duty or transferred to the IRR because of unsatisfactory participation, copies of their orders shall
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**to Report to Duty** be furnished through personal contact by a member of the command or by written transmittal. Orders are to be sent using certified mail, return receipt requested. Postal receipts are to be retained in the member's record. Individuals ordered to active duty who fail to report shall be separated for misconduct.

Individuals failing to comply with any involuntary order to active duty shall be reported as absent without official leave to civilian authorities. Such personnel are subject to the Uniform Code of Military Justice (UCMJ) as of their scheduled reporting date, whether or not they have reported to active duty.

At the discretion of each command, units can enforce or utilize the UCMJ Absence Without Leave (AWOL) provisions or the failure to obey orders regulation if the member was properly counseled and ordered to report to active duty.

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**Discharge  
Information**

A board of officers, when required, shall review commissioned officers with unsatisfactory participation or when a discharge under other than honorable condition is recommended. The board shall consider the circumstances and recommend appropriate action.

Enlisted members may be discharged for unsatisfactory participation. Unless the member requests a hearing before an Administrative Discharge Board, the discharge process does not require convening a board to consider the circumstances and recommend appropriate action when the appropriate commander has recommended the member be honorably discharged and the member does not possess the potential for useful service.

See article 4.B.2. of the Reserve Policy Manual and article 12.B of the Personnel Manual for additional information.

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## **No-Shows and Non-Participating Members (Continued)**

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**Discharge Chain of** Upon command determining the member should be processed for

**Responsibility**

discharge:

Commanding Officer:

- (1) Prepare memo and discharge recommendation packet
- (1) Gather supporting documentation (Administrative Remarks, counseling records, etc.)
- (3) Submit to servicing ISC (pf)

ISC (pf):

- (1) Review claim packet
- (2) Endorse unit's recommendation
- (3) Forward to Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm)

CGPC-rpm:

- (1) Review discharge recommendation packet
- (2) Contact servicing ISC (pf) with decision to discharge or retain member

ISC (pf):

- (1) Notify unit of the CGPC-rpm ruling

Unit:

- (1) Notify member of the CGPC-rpm ruling
- (2) Start discharge process if necessary

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**Montgomery G. I. Bill (MGIB)**

If a member fails to participate before completing the six-year obligation incurred to qualify for the Montgomery G. I. Bill (MGIB) and has received educational benefits, such entitlement shall be suspended. The command may involuntarily order the member to active duty or initiate action to recoup funds. See article 4.B.2.a.(4) of the Reserve Policy Manual and the Montgomery G.I. Bill – Selected Reserve Educational Assistance Program, COMDTINST 1001.30(series) for additional information.

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Screening the Ready Reserve, Department of Defense Directive 1200.7

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**No-Shows and Non-Participating Members (Continued)**

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
Direct Access: <http://www.uscg.mil/hq/psc/cghrms>  
CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>  
Memorandum Format: [http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM\\_5216\\_4C.pdf](http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM_5216_4C.pdf)  
MGIB: <http://www.gibill.va.gov/education/c1606.htm>  
PSC-SES: <http://www.uscg.mil/hq/psc/ses.htm>  
Department of Defense:  
<http://www.dtic.mil/whs/directives/corres/html/12007.htm>

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## Chapter 4 – Laterals, Assignments, and Retirement

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## Lateral Changes in Rating

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### General Information

A lateral change in rating is a rate change where the member does not change pay grade.

A reservist may laterally change their rating in order to maximize the use of their skills while simultaneously meeting the needs of the Service. Lateral changes in rating are authorized based on position vacancies and the desires and qualifications of the individual.

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### Regulations

A reservist must be authorized to prepare for a lateral change in rating and must then perform the minimum requirements to complete the change.

Reservists authorized to prepare for a change in rating shall only train in the rating requested and shall not be advanced in their current rating.

Members who attended “A” school within the last two years, and are requesting a lateral that requires attending a different “A” school, will likely have to finish the initial service obligation before the lateral can take place.

If a lateral requires a Permanent Change of Station (PCS), orders will not be processed until the lateral has been approved.

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### Request Regulations

Enlisted reservists in pay grades E-4 and above may apply for a lateral change in rating.

Commanding officers must endorse all requests.

Only the servicing ISC (pf) or Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) can authorize requests for lateral changes in rating.

The servicing ISC (pf) can approve or deny requests for personnel in pay grades E-4 through E-6, unless the lateral would require the member to attend “A” school.

For reservists in pay grades E-7 and above, and those members requiring “A” school attendance to lateral, requests are forwarded to CGPC-rpm for approval.

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## Lateral Changes in Rating (Continued)

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<b>Request Regulations (continued)</b>	Members requesting to be assigned to the Coast Guard Investigative Service (CGIS) should refer to the Reserve Policy Manual for guidance.
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### Chain of Responsibility

Member:

- (1) Write letter requesting permission to pursue a lateral change in rating
- (2) Submit request to command for endorsement

Command:

- (1) Endorse all requests
- (2) Submit endorsement to unit admin

Unit Admin:

- (1) Forward request to servicing ISC (pf)

ISC (pf):

For members not in need of “A” school or members in pay grade E-6 and below:

- (1) Approve or deny lateral request
- (2) If lateral request is approved, process Permanent Change of Station requests (if applicable)
- (3) Notify member’s command via E-mail

For members requiring “A” school, and members in pay grade E-7 and above:

- (1) Forward request to CGPC-rpm

CGPC-rpm:

- (1) Approve or deny lateral request
- (2) Notify member’s command, member, and servicing ISC (pf) by mail

Command:

- (1) Notify member’s Personnel Reporting Unit (SPO)

ISC (pf):

- (1) File CGPC-rpm letter
- (2) Assign new position number
- (4) If applicable, process PCS requests
- (5) Contact member’s SPO by mail of new number and indicator

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## Lateral Changes in Rating (Continued)

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### Chain of Responsibility (continued)

#### SPO:

- (1) Change training rating indicator in Direct Access
- (2) Change position number in Direct Access

#### Unit:

- (1) Counsel member annually until lateral change in rating is complete
- (2) Ensure member meets all requirements for change in rating within three years

#### Member:

- (1) If lateral change in rating is not complete within three years, apply for an extension via servicing ISC (pf)
- 

### Post-Approval Information

Changes in rating must be completed within three years of approval. If a member has not completed training within the allowed time, the authorization is cancelled, the reservist's training rating indicator is removed, and the member will revert to their original rating. Extensions may be granted to complete training in the new rating.

The servicing ISC (pf) may authorize a one-time, one-year extension for members to complete rating requirements. Reservists must submit a letter, via their chain of command, to the servicing ISC (pf) for consideration.

For reservists requiring an extension exceeding one year, the determination is made by CGPC-rpm. Requests are to be submitted via the servicing ISC (pf) and forwarded to CGPC-rpm.

The lateral change is complete when the member meets all the requirements of the new rating.

The servicing ISC (pf) will track personnel authorized to change ratings. Reservists will be notified when their authorization period has expired. Appropriate action will be taken to remove the reservist's training rating indicator.

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## Lateral Changes in Rating (Continued)

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### **Reserve Service Wide Examination (RSWE)**

Members not fully qualified in their new rating cannot take the Reserve Service Wide Exam (RSWE) for their former rating.

When a member has completed the lateral change in rating, the member must have a command recommendation and participate in the next RSWE. The member's name must appear on the subsequent advancement list.

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINDT M1000.6A

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### **Additional Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>

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## Assignment and Transfer Policy

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### **General Information**

Reserve vacancies are listed on the Reserve Personnel Allowance List (RPAL). These vacant billets represent the Coast Guard's highest priority positions best filled by reservists.

Assignment Officers (AO) assign reservists to positions in the reservists' local geographic area or reasonable commuting distance (RCD). AOs authorize assignments by issuing no-cost Permanent Change of Station (PCS) transfer orders through Direct Access (DA).

AOs strive to balance the needs of the Coast Guard with the needs of its reservists.

The member's E-Résumé in DA is the primary method to indicate assignment preferences. Members may also use the Coast Guard Direct Access Assignment Data Worksheet (CG PSC-2002).

Immediate reassignment is required if a reservist is advanced, promoted, or appointed to a pay grade senior to that of their Officer-in-Charge or Commanding Officer.

Enlisted members in pay grade E-6 and below, chief warrant officers, and commissioned officers in pay grade O-3 and below need not be assigned when promoted or advanced, in order to provide geographic stability for reservists and in order for unit commanders to receive a greater return on their training investment.

All requests for transfer, extension, or early rotation must be approved and endorsed by the member's command.

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### **Additional Guidance**

When reservists are advanced or promoted to pay grades senior to the ranges established by their positions, AOs will attempt to assign the members to more senior positions at the same commands, but may be required to assign them to more senior positions at other commands within the local commuting area as vacancies and surpluses occur.

On an individual basis, AOs may allow members to remain in position even though they have exceeded the grade range. This is permissible if it is in the best interest of the unit, the member, other units and other members, or of regional operational commanders.

## Assignment and Transfer Policy (Continued)

<b>Additional Guidance (continued)</b>	The missions and deployable nature of Maritime Safety and Security Teams, Naval Coastal Warfare Squadrons, Port Security Units, and Naval Coastal Warfare Groups (MSST, NCW, PSU, NCWG) requires that personnel manning integrity is maintained at all times. All RPAL billets must be filled for these units. Assignments will be made accordingly. Reservists who live within a Reasonable Commuting Distance (RCD) of said units should expect one or more mandatory assignments.
<b>Assignment Considerations</b>	<p>Assignments are made by determining the “Quality of Match” between vacant positions on the RPAL and members requesting or forced to transfer.</p> <p>Assignment Officers consider the following while determining assignments:</p> <ol style="list-style-type: none"> <li>(1) Service needs</li> <li>(2) Command concerns</li> <li>(3) Member’s desires</li> <li>(4) Career development</li> <li>(5) Member’s rating (for enlisted personnel)</li> <li>(6) Member’s specialty (for warrant officers)</li> <li>(7) Member’s primary occupation code (for commissioned officers)</li> <li>(8) Member’s special qualifications or competencies</li> <li>(9) Member’s pay grade</li> <li>(10) Reasonable Commuting Distance to unit</li> </ol>
<b>Reasonable Commuting Distance (RCD)</b>	The Coast Guard assigns reservists to vacant positions within their RCD if one is available. RCD is generally defined as 50 miles or 1.5 hours travel time under normal driving conditions from the reservist’s home to the duty site where government meals and quarters are not provided, or 100 miles from the drill site or 3 hours of travel time. This applies only to units who normally schedule four drills on two

consecutive days and where government meals and quarters are provided at the drill site.

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## Assignment and Transfer Policy (Continued)

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### Reasonable Commuting Distance (RCD) (continued)

Members whose positions are deleted or whose units are decommissioned will be afforded every effort to assign them to vacant positions within a RCD of their legal residences. Overbilleting may be authorized.

### Overbillet Status

When a position is not available but needed at a unit, the ISC (pf) may overbillet individuals on a case-by-case basis.

The unit receiving the overbilled reservist must possess valid, continuing justification for the additional member. The unit must also have the capacity to train and support the additional member.

Overbilleting will not occur if there are any vacant positions that meet assignment requirements at other units within a RCD from the member's residence.

### Authorized Overbilleting

AOs may authorize limited overbilleting for:

- (1) RELAD members in pay grades E-6 and below and O-1 through O-3
- (2) Transfers from the IRR or Standby Reserve for all enlisted members, chief warrant officers, and officers in pay grades O-1 through O-3
- (3) All enlisted members, chief warrant officers, and officers in pay grades O-1 through O-3 transferring from other geographic regions
- (4) New accessions E-4 and below in critical ratings (BM, MK, MST, OS, PS)

See ALCOAST 171/04 Selected Reserve Workforce Management for additional information.

### Relocation

Reservists with remaining SELRES obligations whose change of residence moves them further away from their assigned units (but still

within the United States) shall request and be assigned to positions nearer to their new residences, if available.

If the relocation is temporary (two years or less) and is to a region where there is no Coast Guard unit available, and the member cannot meet service obligations (Inactive Duty Training, Active Duty for Training), then the member may request transfer to the Standby Reserve.

## Assignment and Transfer Policy (Continued)

<b>Relocation (continued)</b>	If the relocation is permanent, the member may request a conditional release to join another reserve component of the Armed Forces to fulfill their service obligation.
<b>International Relocation</b>	<p>Members who relocate outside the United States shall notify their servicing ISC (pf) in writing, via their chain of command, as far in advance as possible. Notification shall include the new mailing address and the date of occupancy. Letters should follow the proper Coast Guard memorandum format.</p> <p>If the relocation is temporary, the servicing ISC (pf) shall assign the members with remaining Military Service Obligations (MSO) to the Individual Ready Reserve (IRR) in Training and Pay Category E or to the Standby Reserve, Active Status. Members without a MSO shall be assigned to the Standby Reserve, Active Status.</p>
<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A
<b>Additional Information</b>	<p>U. S. Coast Guard Reserve: <a href="http://www.uscg.mil/reserve/reshmpg.html">http://www.uscg.mil/reserve/reshmpg.html</a></p> <p>Direct Access: <a href="http://www.uscg.mil/hq/psa/cghrms">http://www.uscg.mil/hq/psa/cghrms</a></p> <p>Memorandum Format: <a href="http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM_5216_4C.pdf">http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM_5216_4C.pdf</a></p>

## Assignment and Transfer-Senior Reserve Officers

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### General Information

Senior officers hold the rank of Commander and above, as well as O-5 selectees.

As members become more senior, the opportunities for assignments within a Reasonable Commuting Distance (RCD) are increasingly scarce. The number of positions for SELRES O-5s and O-6s are limited and it is possible members may have to transfer outside their RCD for assignment.

All requests for transfer, extension, or early rotation must be approved and endorsed by the member's command.

Immediate reassignment is required if a reservist is promoted or appointed to a pay grade senior to that of their Commanding Officer.

Maintenance and Logistic Command (MLC) personnel conduct a Senior Reserve Officer Assignment panel to determine Captain and Commander assignments in accordance with the governing ALPERSCOM. The panel convenes annually, after the Captain Continuation board results are released.

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### Assignment Considerations

The primary criteria for billet assignments are:

- (1) Prior experience and documented skills
- (2) Professional experience
- (3) Leadership skills
- (4) Unit input
- (5) Assignment preference
- (6) Documentation of résumé information
- (7) Officer Evaluation Reports (OER)
- (8) Participation in Reserve program
- (9) Any other criteria established by the panel

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<b>Unit Assistance</b>	<p>All reserve officer assignments are completed with the involvement of the command or staff to which the billet is assigned.</p> <p>If a reserve officer being considered for an assignment matches the billet grade, Experience Indicator Code (EIC), and is considered fully qualified for the billet, the command or staff will be informed of the member's assignment and effective date.</p>
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## Assignment and Transfer-Senior Reserve Officers (Continued)

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<b>Unit Assistance (continued)</b>	<p>If the officer does not match the billet, the command or staff will be asked for approval prior to the member's assignment. Senior reserve officers should not be placed in an overbillet status.</p> <p>Commands should ensure the assignment shopping list is expeditiously disseminated. The unit should notify the servicing ISC (pf) of any changes to a senior reserve officer's billet, including job titles or job descriptions.</p> <p>Each command should provide the servicing ISC (pf) with recommendations for assignment of senior officers. Units with vacant senior officer billets shall inform the ISC (pf) of their command desires.</p>
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<b>Promotion and Transfer</b>	<p>Senior officers promoted to a grade senior than their billet do not have the option of completing their current tour or competing for billets in their current pay grade. Officers promoted to O-5 are required to compete for O-5 billets in the next assignment cycle.</p> <p>Senior reserve officers requesting transfers before completion of their current tour may submit a transfer package. It is not likely that such requests will be approved unless compelling service needs demand an early transfer.</p>
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<b>Tour Lengths</b>	<p>The standard tour length for senior reserve officers assigned to an RPAL billet is three years.</p> <p>Commanders assigned to Joint Transportation Reserve Unit, Transportation Command (JTRU TRANSCOM) serve four-year tours.</p> <p>Extensions may be granted if it is in best interest of the command and</p>
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no other qualified officers for the billet are available. When approved, extensions are granted for one year. Officers are reminded they should consider their professional development and career aspirations before requesting an extension.

Overbilled officers are assigned for one year. The overbilleting of reserve officers O-5 and above requires approval from Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm).

## Assignment and Transfer-Senior Reserve Officers (Continued)

### Assignments

Reserve officer assignments will be selected annually, with some exceptions. Maritime Safety and Security Teams, Naval Coastal Warfare Squadrons, Port Security Units, and Naval Coastal Warfare Groups (MSST, NCW, PSU, NCWG) require personnel manning integrity is maintained at all times. All RPAL billets must be filled for these, and other, mission-critical units. Assignments will be made accordingly.

### Assignment and Transfer Requests

Members may request a transfer by submitting an E-Résumé or an Assignment Data worksheet (CG-PSC-2002) if unit/member does not have internet capabilities, via their chain of command. Approval of the requests will be based on the availability of billets, needs of the unit, and member.

E-Résumés (or CG-PSC-2002) must be submitted for the following requests:

- (1) Assignment to an RPAL billet
- (2) Assignment to over billet status
- (3) Transfer to IRR
- (4) Transfer to another district

### Assignment and Transfer Chain of Responsibility

MLC:

- (1) Publish new assignment list
- (2) Release assignment shopping list message to all Coast Guard commands

Units:

- (1) Distribute assignment list to senior reserve officers

Member:

- (1) Review assignment and transfer vacancy list
  - (2) Log on to Direct Access (DA) > Home > Self Service > Tasks > Create E-Résumé
  - (3) Fill out assignment and transfer section
  - (4) Fill out Reserve Officer Personal Résumé (CG-5481), forward E-Résumé and CG-5481 to supervisor
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## **Assignment and Transfer-Senior Reserve Officers (Continued)**

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**Assignment and  
Transfer Chain of  
Responsibility  
(continued)**

Unit Supervisor/Command:

- (1) Review member's E-Résumé and CG-5481
- (2) Enter appropriate comments
- (3) Indicate impact on unit if member transfers
- (4) Approve or deny request
- (5) E-mail servicing ISC (pf), notify that member's E-Résumé and résumé has been submitted

ISC (pf):

- (1) Screen request
- (2) Review member's last three Officer Evaluation Reports (OER)
- (3) Review RPAL
- (4) Validate transfer information with member's command and potential gaining command
- (5) Present selection recommendations to MLC (forwarded with concurrence of District and Senior Reserve Officer)

MLC:

- (1) Convene assignment panel and approve final slate
- (2) Release assignment message

ISC (pf):

- (1) Contact member
- (2) Issue orders
- (3) Update shopping list

SPO:

- (1) Retrieve orders from Airport Terminal
- (2) Prepare transfer orders
- (3) Send hard copy orders to member

- (4) Send orders to departing and reporting units
- (5) Transfer member to new unit/assignment
- (6) Forward Personnel Data Record (PDR) to new SPO

Unit:

- (1) Inform member of new assignment
- (2) Ensure member receives orders

## Assignment and Transfer-Senior Reserve Officers (Continued)

**Assignment and  
Transfer Chain of  
Responsibility  
(continued)**

Member:

- (1) If orders are not received within 30 days of MLC message announcement, contact servicing ISC (pf) and inform departing unit
- (2) Review orders
- (3) After effective date, contact new command
- (4) Coordinate drill schedule

**References**

Reserve Policy Manual, COMDTINST M1001.28A

**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
 Direct Access: <http://www.uscg.mil/hq/psa/cghrms>  
 Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>

## Assignment and Transfer-Junior Reserve Officers

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### **General Information**

Junior officers are commissioned officers holding the rank of Lieutenant Commander and below, including Chief Warrant Officers.

All requests for transfer, extension, or early rotation must be approved and endorsed by the member's command.

Immediate reassignment is required if a reservist is promoted or appointed to a pay grade senior to that of their Officer-in-Charge or Commanding Officer.

Reserve junior officer local assignment panels convene annually. The selection process usually takes place after the results of the reserve senior officer assignment panel are approved or each May, whichever is later. ISC (pf) staff consults with the gaining and losing units when making junior officer assignments.

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**Additional Guidance** Commissioned officers promoted to O-4 should expect to be eligible for reassignment during the next assignment season if they no longer fit the position as a result of a promotion.

A member who advances to O-4 should expect to be reassigned to an O-4 position as soon as one becomes available. This is usually done during the assignment cycle following the promotion.

Chief Warrant Officers and Commissioned Officers in pay grade O-3 and below need not be assigned when promoted. This provides geographic stability for reservists and in order for unit commanders to receive a greater return on their training investment. . However, Reserve officers may be involuntarily transferred to higher priority assignments based on the needs of the service.

Chief Warrant Officers will not be assigned to positions that require a different specialty.

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**RPAL Billet Match** Reserve officers will be assigned to Reserve Personnel Allowance List (RPAL) billets that match their grade and Experience Indicator Code (EIC). A match can be made one grade senior (up to O-4) or one grade junior with command approval.

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## Assignment and Transfer-Junior Reserve Officers (Continued)

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**RPAL Billet Match (continued)** Training assignments may be arranged for junior officers (especially RELADs or direct commission officers) who do not have operational experience. Training assignments are only made with command approval.

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**Unit Assistance** All reserve officer assignments are completed with the involvement of the command or staff to which the billet is assigned.

If a reserve officer being considered for an assignment matched the billet grade and EIC, and is considered fully qualified for the billet, the command or staff will be informed of the member's assignment and effective date.

If the officer does not match the billet or would be assigned to an overbilled position, the command or staff will be asked for approval

prior to the member's assignment.

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**Promotion and Transfer**

Officers promoted to a grade senior than their billet have the option of completing their current tour or competing for billets in their new pay grade. Being promoted to the billet's grade does not extend the tour.

Officers promoted to O-5 are required to compete for O-5 billets in the next assignment cycle.

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**Overbillet Status**

Officers may be overbilled if no "quality of match" RPAL billet is available and if the assignment meets the needs of the command.

Overbilled officers are assigned for one year. This restriction is to ensure they compete and are considered for assignment to a budgeted RPAL billet.

Additionally, overbilled officers shall compete for RPAL billets every rotation cycle until assigned. Overbilled officers are not guaranteed an assignment to an RPAL billet, but compete equally with all officers seeking assignment.

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## Assignment and Transfer-Junior Reserve Officers (Continued)

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**Tour Lengths**

The standard tour length for reserve officers assigned to an RPAL billet is four years (except for expeditionary units), though reserve officers may request assignment and transfer at any time. A standard tour length for expeditionary units is generally five years.

Tour extensions may be granted if it is in best interest of the command and no other qualified officers for the billet are available. When approved, extensions are granted for one year. Officers are reminded they should consider their professional development and career aspirations before requesting an extension.

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**Assignments**

Reserve officer assignments will be effective 01 June, with some exceptions. Maritime Safety and Security Teams, Naval Coastal Warfare Squadrons, Port Security Units, and Naval Coastal Warfare Groups (MSST, NCW, PSU, NCWG) require personnel manning

integrity is maintained at all times. All RPAL billets must be filled for these units. Assignments will be made accordingly.

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**Assignment and Transfer Requests**

Members may request a transfer by submitting an E-Résumé or an Assignment Data worksheet (CG-PSC-2002) if unit/member does not have internet capabilities, via their chain of command. Approval of the requests will be based on the availability of billets, needs of the unit, and member.

E-Résumés (or CG-PSC-2002) must be submitted for the following requests:

- (1) Assignment to an RPAL billet
  - (2) Assignment to over billet status
  - (3) Transfer to IRR
  - (4) Transfer to another district
- 

**Assignment and Transfer Chain of Responsibility**

ISC (pf):

- (1) Upload vacancy list from Direct Access
  - (2) Forward monthly vacancy list to servicing Maintenance and Logistics Command (MLC)
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## Assignment and Transfer-Junior Reserve Officers (Continued)

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**Assignment and Transfer Chain of Responsibility (continued)**

Member:

- (1) Review assignment and transfer vacancy list
- (2) Log on to Direct Access (DA) > Home > Self Service > Tasks > Create E-Résumé
- (3) Fill out assignment and transfer section
- (4) Fill out Reserve Officer Personal Résumé (CG-5481)
- (2) Forward E-Résumé and CG-5481 to supervisor

Unit Supervisor/Command:

- (1) Review member's E-Résumé and CG-5481
- (2) Enter appropriate comments
- (3) Indicate impact on unit if member transfers
- (4) Approve or deny request
- (5) E-mail servicing ISC (pf), notify that member's E-Résumé and résumé has been submitted

Member:

- (1) If not contacted within 15 days of submitting E-Résumé and CG-5481, contact the appropriate ISC (pf)

ISC (pf):

- (1) Screen request
- (2) Conduct local assignment panel
- (3) Review member's last Officer Evaluation Report (OER)
- (4) Review RPAL
- (5) Validate transfer information with member's command and potential gaining command
- (6) Confirm new unit
- (7) Contact member
- (8) Approve assignment and transfer via Direct Access

SPO:

- (1) Retrieve orders from Airport Terminal
  - (2) Prepare transfer orders
  - (3) Send hard copy orders to member
  - (4) Send orders to departing and reporting units
  - (5) Transfer member to new unit/assignment
  - (6) Forward Personnel Data Record (PDR) to new SPO
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## Assignment and Transfer-Junior Reserve Officers (Continued)

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**Assignment and  
Transfer Chain of  
Responsibility  
(continued)**

Unit:

- (1) Inform member of new assignment
- (2) Ensure member receives orders

Member:

- (1) Review orders
  - (2) After effective date, contact new command
  - (3) Coordinate drill schedule
- 

**References**

Reserve Policy Manual, COMDTINST M1001.28A

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>

## Assignment and Transfer-Reserve Enlisted Personnel

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### **General Information**

Reserve enlisted members are not required to transfer units unless they are advanced to a rate beyond their billet specifications, though they are eligible to request assignment and transfers at any time. Reserve enlisted personnel may be involuntarily transferred to higher priority assignments based on the needs of the service.

Members are required to serve at least one year at their current duty station before requesting reassignment or transfer.

Senior enlisted personnel should expect to be eligible for reassignment during the next assignment season if they no longer fit the position as a result of advancement.

Immediate reassignment is required if a reservists is advanced or

appointed to a pay grade senior to that of their Officer-in-Charge or Commanding Officer.

Assignment Officers (AO) will not assign enlisted personnel to positions that require a different rating.

All requests for transfer, extension, or early rotation must be approved and endorsed by the member's command.

If a lateral change in rating has been approved, the member will be assigned to a billet that matches their new training rating indicator.

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**Additional Guidance** Selected Reserve (SELRES) enlisted personnel will be assigned within grade range to match their respective Reserve Personnel Allowance List (RPAL) billets. Assignment officers may assign E-4 or E-7 members to billets up to two grades above their current pay grade. Members E-5 or E-8 may be assigned billets designated for one grade above or below the RPAL designation.

Enlisted members in pay grade E-6 need not be reassigned when advanced. This provides geographic stability for reservists and allows unit commanders to receive a greater return on their training investment.

A member who advances to E-7 should expect to be reassigned to an E-7 position as soon as one becomes available. This is usually done during the assignment cycle following the advancement.

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## Assignment and Transfer-Reserve Enlisted Personnel (Continued)

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**Additional Guidance (continued)** As members become more senior, the opportunities for assignments within a reasonable commuting distance (RCD) are increasingly scarce. The number of positions for SELRES E-8 and E-9s are limited and it is possible that members may have to transfer outside their RCD for assignment.

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**Assignment and Transfer Requests** Enlisted members may request a transfer by submitting an Assignment Data worksheet (CG-PSC-2002) through their chain of command. Approval of the requests will be based on the availability of billets and the needs of the unit and member.

Assignment Data worksheets must be submitted for the following

requests:

- (1) Assignment to an RPAL billet
- (2) Assignment to over billet status
- (3) Transfer to IRR
- (4) Transfer to another district

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**Transfers**

Enlisted members may be transferred due to one of the following circumstances:

- (1) The billet is reprogrammed
- (2) The member no longer matches the billet to which assigned
- (3) The member is overbilled at a unit and a billet is available at another unit within the member's RCD
- (4) To meet the needs of the service, including assignment to a Maritime Safety and Security Team, Harbor Defense Command Unit, Port Security Unit, or Naval Coastal Warfare Group (MSST, NCW, PSU, NCWG)

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**Assignment and Transfer Chain of Responsibility**

Maintenance and Logistics Command (MLC):

- (1) Publish new vacancy list
- 

**Assignment and Transfer-Reserve Enlisted Personnel (Continued)**

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**Assignment and Transfer Chain of Responsibility (continued)**

Member:

- (1) Review assignment and transfer vacancy list
- (2) Fill out Assignment Data worksheet (CG-PSC-2002) (dream sheet)
- (3) Log on to Direct Access (DA) > Home > Self Service > Tasks > Create E-Résumé
- (4) Request assignment and transfer
- (5) Forward worksheet and E-Résumé to supervisor

Unit Supervisor/Command:

- (1) Review member's E-Résumé and CG-PSC-2002
- (2) Enter appropriate comments
- (3) Indicate impact on unit if member transfers

- (4) Approve or deny request
- (5) E-mail servicing ISC (pf), notify that member's E-Résumé has been submitted

**Member:**

- (1) If not contacted within 15 days of submitting E-Résumé, contact the appropriate ISC (pf)

**ISC (pf):**

- (1) Screen request
- (2) Review RPAL
- (3) Validate transfer information with member's command and potential gaining command
- (4) Confirm new unit
- (5) Contact member
- (6) Approve assignment and transfer via Direct Access
- (7) Notify gaining and losing commands

**SPO:**

- (1) Retrieve orders from Airport Terminal
  - (2) Prepare transfer orders
  - (3) Send hard copy orders to member
  - (4) Send orders to departing and reporting units
  - (5) Transfer member to new unit/assignment
  - (6) Forward Military Personnel Data Record (PDR) to new SPO
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## **Assignment and Transfer-Reserve Enlisted Personnel (Continued)**

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**Assignment and  
Transfer Chain of  
Responsibility  
(continued)**

**Unit:**

- (1) Inform member of new assignment
- (2) Ensure member receives orders

**Member:**

- (1) Review orders
  - (2) After effective date, contact new command
  - (3) Coordinate drill schedule
- 

**References**

Reserve Policy Manual, COMDTINST M1001.28A

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>

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## Retirement

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**General  
Information**

A minimum of 20 years qualified service entitles reserve personnel to become eligible for retired pay and benefits at age 60. Qualified service is a “good” retirement year; a member has earned a minimum of 50 retirement points during their anniversary year.

Upon retirement, a member shall be placed on the retired list in the highest grade in which they have satisfactorily served or in the highest grade for which the member is eligible according to law.

Retired reservists are not considered or eligible for promotion. They are, however, subject to recall and may be forced to attend training

sessions or earn retirement points.

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**Reserve Retirement  
Point Caps**

Reserve members earn retirement points for each drill, day of active duty, training, and supplementary duty performed. Members are given 15 membership points per anniversary year while serving in a drilling capacity.

Members may receive credit for up to 60 points for retirement years that ended before 23 September 1996, up to 75 points for retirement years ending on or after 23 September 1996 and before 30 October 2000, and up to 90 points for retirement years after 30 October 2000.

Members may only retain 90 inactive duty points per anniversary year. Inactive duty points are the points earned by drilling and completing correspondence courses, and the annual membership points. Reservists can only keep 365 points per anniversary year (366 in leap years) if the member was on active duty or in a mobilized status.

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**Retirement  
Categories**

Members of the Retired Reserve include those who have met the eligibility requirements for regular retirement and have requested transfer to retired status and those who have been retired for physical disability.

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## Retirement (Continued)

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**Retirement  
Categories  
(continued)**

The three sub-categories of the Retired Reserve are:

- (1) RET-1: Members have met the minimum time-in-service requirements for non-regular retired pay (at, or after age 60)
- (2) RET-2: Members have met the minimum time-in-service requirements for non-regular retired pay and are not yet 60 years old. If past 60, members have not applied for non-regular retirement pay
- (3) Disability Retiree: Members have retired for physical disability reasons. Members have completed 20 years of service ("good" retirement years) or are 30% or more disabled and otherwise

disqualified

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**Retirement  
Eligibility**

Reservists who have completed between 18 and less than 20 years of creditable service toward eligibility for reserve retired pay may not be discharged or transferred from an active reserve status (and lose their eligibility for retirement due to having less than 20 years of creditable service) until the earlier of the following dates:

- (1) The date on which the member is entitled to be credited with 20 years of satisfactory service
- (2) The third anniversary of the date on which the member would otherwise be discharged or transferred from active reserve status (if member has at least 18, but less than 19 years of service)
- (3) The second anniversary of the date on which the member would otherwise be discharged from active service (if member has at least 19, but less than 20 years of service)

The law protecting a member's retirement eligibility does not apply to members discharged from an active reserve status because of disability or age.

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**Eligibility  
Notification**

Personnel Service Center-Retiree and Annuitant Services Branch (PSC (RAS)) informs retirement-eligible members by sending an "Information Concerning Retirement With Pay (RET-1)" letter and information about the Reserve Component Survivor Benefit Plan.

Retirement packages for drilling reservist will be sent approximately one month before their 60<sup>th</sup> birthday. Retirement packages for non-drilling reservists will be sent approximately six months prior to the member's 60<sup>th</sup> birthday. All retirement applications will be sent to the member's home.

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**Retirement (Continued)**

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**Involuntary  
Transfer to RET-2  
Status**

Reservists may be involuntarily transferred to RET-2 status (retired awaiting pay). If an enlisted reservist has over 20 years satisfactory service and the member's enlistment expires without re-enlisting, the reservist may be involuntarily transferred to RET-2 status. In such cases, the reservist's unit shall notify the servicing ISC (pf) that the member failed to re-enlist. The ISC (pf) shall notify Personnel Service Center-Retiree and Annuitant Services Branch (PSC (RAS)). PSC (RAS) shall transmit Endorsement on Orders transactions to transfer the

reservist to RET-2 status.

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**Date of Initial Entry to Military Service (DIEMS) and Longevity Credit**

The Date of Initial Entry to Military Service (DIEMS) is the date an individual became a member of the Armed Forces. This date will never change, even if there has been a break in service. The DIEMS is the sole determining factor in determining which retirement system is used when computing retired pay.

A former member is an individual who elected discharge rather than transfer to a retired status anytime after receiving notification of eligibility to receive retired pay at age 60. In case of a former member, regardless of the system under which the individual will receive retirement pay, longevity credit ceases on the date the former member was discharged.

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**Reserve Retirement Systems**

There are two Reserve retirement systems that parallel the active duty retirement system:

- (1) Final Basic Pay
- (2) High-Three

A member with a DIEMS date prior to 08 September 1980 is under the Final Basic Pay system and receives 50 percent of final basic pay after 20 years of military service plus 2.5 percent for each additional year up to the 75 percent maximum for 30 years of service.

The High-Three Retirement System is used for members with a DIEMS date of 08 September 1980 or later. Within this system, there are two ways to determine Reserve retired pay. The first computation is for members who, at any point after receiving notification of eligibility to receive retired pay at age 60, transfer to the Retired Reserve while waiting to turn 60 years old. A second computation is for members who choose to separate from the Reserve Component after receiving notification of eligibility to receive retired pay at age 60.

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## Retirement (Continued)

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**Reserve Retirement Systems (continued)**

Retiring members receive longevity credit for the years while in an RET-2 status. This does not apply to former members who are entitled to retired pay under the Final Basic Pay system or the High-Three system.

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**Final Basic Pay System Calculations**

Reserve retired pay under the Final Basic Pay system is computed using the following method:

- (1) Dividing all points credited in all years by 360 to convert the points into years of service, including fractions
  - (2) Using the pay table in effect on the date that the member or former member reaches 60 years of age, taking the monthly basic pay rate for the member's highest grade satisfactorily held and length of service at the time the member reaches age 60; or in the case of a former member, the length of service as determined when the former member was discharged
  - (3) Multiplying that rate by 2.5 percent of the years of service (up to the 75 percent maximum for 30 years of service) computed in (1) above
- 

**High-Three System Calculations**

The retired pay for a member who elects transfer to the Retired Reserve is computed using the average monthly basic pay rate to which the member would have been entitled at the highest grade satisfactorily held, had the member been on active duty during the entire period of the member's high 36 months. In most cases, this would be the average basic pay rate in effect for the member at ages 57, 58 and 59. The formula to compute the retired pay is as follows:

- (1) Divide all points credited in all years by 360 to convert the points into years of service, including fractions
  - (2) Take the average of the last 36 months of monthly basic pay for the member's grade and length of service at the time the member becomes entitled to receive retired pay-age 60 (remember to include longevity increases while a member of the Retired Reserve)
  - (3) Multiply that rate by 2.5 percent of the years of service (up to a maximum of 30 years of service) computed in (1) above
- 

**Retirement (Continued)**

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**Retirement With Pay (RET-1) Chain of Responsibility**

The Retirement with Pay (RET-1) process begins six months prior to a member reaching age 60 or completing 20 years of satisfactory service.

PSC (RAS):

- (1) Notify member in writing by sending an "Information Concerning Retirement With Pay (RET-1)" letter and

information about the Reserve Component Survivor Benefit Plan

- (2) Send retirement package for drilling reservists to member's home address one month prior to their 60<sup>th</sup> birthday
- (3) Send retirement package for non-drilling member approximately six months prior to their 60<sup>th</sup> birthday

Member:

- (1) Upon receipt of letter, request transfer to RET-1 status by completing Reserve Retirement Transfer Request (CG-PSC-2055A) and Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election (CG-PSC 4700) forms (requests must be for a future date and not sooner than three months from submission date)

PSC (RAS):

- (1) One month prior to retirement, forward Retirement Letter, Final Point Statement, and Retirement Certificate (if applicable) to member
- (2) On member's retirement day, transmit Endorsement on Orders transaction

**Retirement With Pay (RET-2) Chain of Responsibility**

Retirement Awaiting Pay at Age 60 (RET-2) is for reservists who have satisfied all requirements for RET-1, except reaching age 60. Members may request transfer to RET-2 status any time after the receipt of notification of 20 years of satisfactory service. Retirement requests may be submitted up to one year in advance of the anticipated retirement date, but at least three months prior to the requested date of retirement.

Members are transferred to RET-1 status upon turning 60. This process only applies to members choosing RET-2 status rather than continuing to remain in a drilling status.

## Retirement (Continued)

**Retirement With Pay (RET-2) Chain of Responsibility (continued)**

PSC (RAS):

- (1) After member completes 20 years of satisfactory service, send "20 Year Letter" notifying member of eligibility for RET-2 Retirement
- (2) Send member Reserve Retirement Transfer Request (CG-PSC-

2055A) and Retired (Active or Reserve) Pay Account  
Worksheet and Survivor Benefit Election (CG-PSC 4700) forms

Member:

- (1) Upon receipt of letter, may request transfer to RET-2 status by completing Reserve Retirement Transfer Request (CG-PSC-2055A) form (requests must be for a future date and not sooner than three months from submission date)
- (2) Fill out CG-PSC-4700 (optional)
- (3) Forward CG-PSC-2055A to Commanding Officer

Commanding Officer:

- (1) Endorse request
- (2) Forward to servicing ISC (pf)
- (3) If member is an Officer, forward endorsed request to Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm)

ISC (pf):

- (1) Endorse request
- (2) Assure member's billet is vacated
- (3) Announce vacancy as quickly as possible

PSC (RAS):

- (1) Upon receipt, process request
- (2) Forward Retirement Information Package to member
- (3) Issue Retirement Certificate to member
- (4) On member's RET-2 retirement day, transmit Endorsement on Orders transactions to RET-2 status

---

**Retirement Pay**

Retirement pay is paid on the first working day of the month following the member's retirement date and each month thereafter. Retired personnel will receive a statement of income only when there is a change to retired pay. Monthly Leave and Earning Statements (LES) are not sent to retired members.

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**Retirement (Continued)**

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**Retirement Pay and  
Cost of Living  
Adjustment**

Members retiring under the Final Basic Pay or High-Three systems receive a Cost of Living Adjustment (COLA) annually as determined by the increase in the Consumer Price Index (CPI).

Members who entered the service prior to 01 August 1986 receive COLA based on the full percentage of increase to the CPI.

Members who entered the service on 01 August 1986 or later will receive COLA one percentage point less than the increase in CPI. These members will receive a one-time pay adjustment at age 62. This adjustment credits the member with the 1% lost COLA from the first years of retirement, credits the member with the percentage of pay the member would have received under the computation of retired pay, and increases the member's SBP base amount and cost commensurate with the above adjustments.

During the first year of retirement, members receive a reduced COLA; members receive an increase on 01 January of the following year.

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**Retirement Pay  
Delays**

Retired pay normally begins on the retiree's 60<sup>th</sup> birthday. Even if the application is finalized after age 60, pay is retroactive. There is six-year statute of limitations. If the retired pay application is filed more than six years after age 60, one day's retired pay is deducted for each day's delay.

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**Taxes**

Retired pay is subject to federal income taxation. The monthly withholding deductions are based on the amount of pay received and exemptions claimed on the member's IRS W-4 form. Each January retirees will receive a 1099-R showing how much was withheld and the amount of taxable retired income.

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**Additional Pay  
Information**

After a member has been granted retirement pay or been notified of their eligibility to receive retirement pay at age 60, their eligibility may not be denied or evoked because of any error, misinformation, or administrative determination of years of service performed, unless it resulted directly from fraud or misrepresentation by the individual concerned.

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**Retirement (Continued)**

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**Additional Pay  
Information  
(continued)**

The amount of retired pay may be adjusted to correct any error, miscalculation, misinformation, or administrative determination, and when such a correction is made, the retiree is eligible for retired pay computed on the basis of the corrected number of satisfactory years of

service.

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**Survivor Benefit Plan (SBP)**

Upon a retiree's death, retired pay stops. The only way a retiree's survivor can receive any monthly annuity payment from the Coast Guard is if the retiree purchases coverage under the Survivor Benefit Plan (SBP). The plan provides retirees an opportunity to leave a portion of their retired pay to their survivors at a reasonable cost. Members may choose how much of their retired pay they wish to insure.

The Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election (CG-PSC 4700) form is used to:

- (1) Establish a retired pay account
- (2) Record Survivor Benefit Plan Election (SBP)
- (3) Record member's spouse's concurrence with the SBP election

Any election not to participate or to participate at a reduced base amount, if not rescinded or changed prior to the first date of entitlement to retired pay, is irrevocable.

The cost for SBP coverage is deducted monthly from retired pay. SBP costs reduce taxable retired income. Annuities paid to survivors are taxable.

Coverage is protected against inflation; SBP premiums increase with cost of living increases.

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**Survivor Benefit Plan (SBP) Participation and Beneficiaries**

The retiree must elect to participate in the SBP prior to the actual retirement date. The retiree must also select which survivors will be covered under the plan. This applies to personnel being recalled to active duty on the first date of retirement, too. Failure to submit the CG-PSC 4700 prior to the first date eligible to receive retirement pay will result in an automatic maximum SBP coverage. If a member elects not to participate in the SBP, or opts to participate at less than the maximum level, their spouse must be notified and complete part of the application form.

## **Retirement (Continued)**

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**Survivor Benefit Plan (SBP) Participation and**

SBP beneficiaries shall be changed when a retiree gets a divorce, remarries, or whose beneficiary has deceased. Members will have one year to change the election. It is irrevocable if the change is not made

**Beneficiaries** within one year.  
**(continued)**

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**Mandatory Age Separations** Reservists serving in an active status will be removed from an active status upon reaching age 60. Any member qualified for retirement who does not request to be transferred to the Retired Reserve will be transferred to the Standby Reserve Inactive Status List (ISL) on the day the member reaches age 60.

A member not qualified for retirement shall be discharged without board proceedings unless approved by the Office of Reserve Affairs (G-WTR) to defer the member's retirement until age 62 (or sooner if the member becomes retirement qualified in the interim).

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**Mandatory Service Separation** Officers serving in the grade of Captain (O-6) shall be removed from an active status after completion of 30 years total commissioned service, if they are not carried on an approved list of selectees for promotion to Rear Admiral (Lower Half).

Commissioned Warrant Officers shall be removed from an active status after completion of 30 total years of service in an active status. Chief Warrant Officers wishing to continue in an active status beyond 30 years may apply to the Coast Guard Personnel Command-Office of Reserve Personnel Management (CGPC-rpm) via their chain of command and servicing ISC (pf).

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**Retirement Certificates** Members requesting RET-2 status will receive retirement certificates upon approval from PSC (RAS) rather than at age 60 when transferred to RET-1 status.

PSC (RAS) provides a Coast Guard Certificate of Retirement, Certificate of Appreciation from the President of the United States, and a Coast Guard Certificate of Appreciation for a member's spouse. Certificates will be presented to the member at a suitable ceremony. Members of the Individual Ready Reserve (IRR) or Standby Reserve will have their certificates mailed to them.

## **Retirement (Continued)**

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**Medical and Dental Issues** No physical standards are prescribed and no physical examination is specifically required for reservists to transfer to retired status.

Medical and dental care at military treatment facilities is available for members in an RET-1 status. Retirees and their families receive all medical benefits their active duty counterparts receive.

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**Social Security**

Military members contribute to Social Security (FICA) throughout their careers. The Coast Guard matches each member's contribution in the Social Security fund as well.

Retirees are eligible for Social Security benefits upon reaching the prescribed age. Receipt of military retired pay has no effect on eligibility for Social Security benefits.

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**Veterans' Group Life Insurance (VGLI)**

Retired reservists do not have coverage under Servicemembers' Group Life Insurance (SGLI), but may elect coverage under Veterans' Group Life Insurance (VGLI). This includes reservists in RET-1 and RET-2 categories.

Requests for coverage under VGLI must be made within 120 days of retirement; the first 120 days after retirement are free.

An enrollment application will be mailed to the member during the 120-day free coverage period from the Office of Servicemembers' Group Life Insurance (OSGLI) to convert SGLI to VGLI. Enrollment must be effected through the Office of SGLI.

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**Uniforms**

Retired members may wear the uniform of the grade or rate held on the retired list, when the uniform is appropriate. The current uniform, or the one that was in effect at the time of retirement, may be worn.

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## Retirement (Continued)

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**Uniforms  
(continued)**

The uniform may be worn by retirees at the following times:

- (1) Memorial services
- (2) Military weddings

- (3) Military funerals
- (4) Patriotic parades
- (5) Other formal occasions
- (6) While teaching a course of instruction at a maritime academy or Reserve Officers' Training Corps (ROTC) program

Retired personnel are prohibited from wearing the uniform:

- (1) In connection with non-military activities of a business nature
- (2) While in a foreign country, except by formal invitation or by the customs or regulations of the country
- (3) In any situation where wearing the uniform gives the perception of Coast Guard endorsement, approval, or association of an institution or cause whose policies, traditions, or standards are in conflict with those of the Coast Guard, Secretary of Homeland Security, or the President of the United States

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### **Retired Recall Authority**

Retired personnel may be recalled to active duty under 10 USC 12307 (subject to conditions in 10 USC 12301, war or national emergency declared by Congress) only after the Secretary of Homeland Security determines there are not enough qualified members in the Ready Reserve in the required category readily available. RET-1 and RET-2 members are subject to recall.

The 10 USC 12301 recall authority is limited to use in times of war or national emergency as declared by Congress. This recall is involuntary and may last for the duration of war or national emergency, plus six months.

If a member is immediately recalled to active duty upon retirement (no break in service), the Assignment Officer will issue Recall from Retirement Orders via Direct Access. There is no need to retire the member.

If a member is recalled to active duty after a break in service of more than 24 hours, Coast Guard Personnel Command (CGPC) creates the orders. If a member is recalled from RET-2 status for any length of time, the Assignment Officer issues orders to the member.

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## **Retirement (Continued)**

### **Identification Cards and Decals**

The Defense Eligibility Enrollment Reporting System (DEERS) is a computerized information system containing over 13 million

beneficiary records linked by an extensive communications network to Uniformed Services installations. DEERS data is used to provide information for identification card issuance and to verify and confirm eligibility for individuals entitled to member benefits.

Retired members shall receive a retired identification card. Members will automatically be enrolled in DEERS with an indefinite expiration date.

Family members of personnel retired with pay are enrolled in DEERS when an Application for Uniformed Service Identification Card/DEERS Enrollment (DD-1172) is completed and information transmitted to DEERS. The form is available online or from the nearest military identification card issuing facility.

Retired reserve personnel are required to remove the reserve Department of Homeland Security/United States Coast Guard facility access decal from their vehicle or apply for a retired member decal.

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**Base Facilities**

Reserve retirees, and their eligible family members, are authorized access to and use of base exchanges, commissaries, and other military-only facilities.

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**Enlistment  
Expiration**

Reservists whose enlistments normally would have expired while they were involuntarily recalled to Active Duty, except that their enlistment was involuntarily extended, shall be expeditiously discharged or released from Active Duty as appropriate, unless they are qualified for and request re-enlistment. Members requesting to re-enlist shall be immediately re-enlisted to prevent a break in service.

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**References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Coast Guard Medical Manual, COMDTINST M6000.1B  
Reserve Forces Almanac  
10 U. S. Code

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**Retirement (Continued)**


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**Additional**     [U. S. Coast Guard Reserve: http://www.uscg.mil/reserve/reshmpg.html](http://www.uscg.mil/reserve/reshmpg.html)

**Information**    [U. S. Code: http://assembler.law.cornell.edu/uscode/](http://assembler.law.cornell.edu/uscode/)  
[Forms and Worksheets: http://www.uscg.mil/hq/psc/forms/index.htm](http://www.uscg.mil/hq/psc/forms/index.htm)  
DEERS Facility Locator: <http://www.dmdc.osd.mil/rsl/>  
Direct Access: <http://www.uscg.mil/hq/psa/cghrms>  
PSC: <http://www.uscg.mil/hq/psc/ras.htm>  
Healthcare Benefits: <http://www.tricare.osd.mil/>  
Retired Pay Calculator:  
<https://www.2xcitizen.usar.army.mil/soldierservices/retirement/retirementcalc.asp>  
VGLI: <http://www.insurance.va.gov/>  
Social Security: <http://www.ssa.gov/>

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## Reserve Retirement Points

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<b>General Information</b>	Reserve members earn retirement points for each drill, day of active duty, training, and supplementary duty performed. These accumulated points can lead to retirement benefits when a member separates from the Service.
<b>Fiscal Year (FY)</b>	<p>A fiscal year (FY) is any 12-month period that a business or agency uses for accounting purposes.</p> <p>The FY for the Federal Government begins on 01 October and ends on 30 September. The fiscal year is designated by the calendar year in which it ends; for example, FY 2006 begins on 01 October 2005 and ends on 30 September 2006.</p> <p>The Coast Guard's FY budget includes resources for the Reserves. The funds designated for reservists are used to pay salaries and cover training costs.</p> <p>FY is a common date on which participation standards and training requirements are based.</p>
<b>Anniversary Year (AY)</b>	<p>An anniversary year (AY) starts on the date that the member entered into military service. This date changes only if there was a break in service.</p> <p>AY is career, retirement, and benefit based.</p> <p>Each reservist has a different anniversary year date so, for uniformity, training requirements are based on the fiscal year.</p>
<b>Retirement Year</b>	A "good" retirement year is one in which a member has earned a minimum of 50 retirement points during their anniversary year. The accumulation of 20 retirement years is required for reservists seeking to retire with pay benefits.

## Reserve Retirement Points (Continued)

**Retirement Points**

Members earn one retirement point for each (day of):

- (1) ADT-AT
- (2) Active Duty-other Training Duty (ADT-OTD)
- (3) Active Duty Special Work (ADSW)
- (4) Extended Active Duty (EAD)
- (5) Involuntary Recall
- (6) Active Duty
- (7) Funeral Honors Duty (FHD)
- (8) Readiness Management Period (RMP)

Members earn one retirement point for each single IDT drill performed and earn two retirement points for each multiple IDT drill performed.

Reservists are given 15 membership points per anniversary year while serving in a drilling capacity.

Reservists can only keep 365 points per AY (366 in leap years).

Members may only retain 90 inactive duty points per AY. Inactive duty points are the points earned by drilling and completing correspondence courses, and the annual membership points.

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**Participation Standards**

Members are required to complete at least 90% of scheduled Inactive Duty Training (IDT) drills, and at least 12 days of Active Duty for Training-Annual Training (ADT-AT) each fiscal year. Reservists must accrue at least 50 points per AY, but may earn up to 75 points in a satisfactory FY by drilling.

Annual training requirements are based on the fiscal year due to funding limitations and the fact that members have different anniversary years. Drills are issued by fiscal year, but are accounted for in anniversary years, so it is possible for reservists to have a satisfactory FY, but not AY, and visa versa.

Reservists may not perform two ADT-AT sessions per fiscal year, even if the active duty is performed over two anniversary years. ADT-AT is a fiscal year requirement and only allowed once per fiscal year.

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**Reserve Retirement Points (Continued)**

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**Annual Reserve Retirement Point Statement**

The Personnel Service Center (PSC) in Topeka, Kansas, issues the Annual Reserve Retirement Point Statement (CG-4175A). Statements are issued based on member's anniversary date and sent to the member's home.

The form lists all IDT drills performed, correspondence courses completed, periods of active duty, and retirement points earned during the past anniversary year. It also shows the total years of satisfactory service and number of cumulative retirement points earned.

Upon receiving the Annual Reserve Retirement Point Statement, reservists are encouraged to verify each entry of the statement. The information should be cross-referenced carefully with each Leave and Earning Statement (LES), completed correspondence courses, and all other documented service.

Each servicing SPO has a copy of the member's CG-4175A. If a member does not receive the form, their SPO should first be contacted.

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**Reserve Point Adjustment**

Questions about statements should be directed to the servicing Personnel Reporting Unit (SPO) within 45 days. Discrepancies on the form are to be highlighted, supporting documentation (copies of orders, Leave and Earning Statement, etc.) provided, and concerns outlined in a letter.

Credit for correspondence courses will only be given if a copy of the completion letter, verifying the completion date and number of points earned, is included with the credit request.

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**Reserve Retirement Point Adjustment**

All retired personnel with point statement issues should contact Personnel Service Center-Retiree and Annuitant Services Branch (PSC (RAS)). Supporting documentation, such as pay stubs or drill orders, should be on hand when initially contacting the PSC. The PSC will subsequently require copies of all documentation.

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**Reserve Retirement Points (Continued)**

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<b>Reserve Retirement Point Adjustment (continued)</b>	Retirees requesting credit for active duty performed should include signed copies of the orders. Credit for correspondence courses will only be given if a copy of the completion letter, verifying the completion date and number of points earned, is included with the credit request.
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<b>Additional Benefits</b>	In addition to accumulating points to satisfy retirement years, the same “good” years provide short-term benefits to reservists.
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Retirement years are used to verify eligibility for the Coast Guard Reserve Good Conduct Medal and the Armed Forces Reserve Medal.

The Coast Guard Reserve Good Conduct Medal is issued to enlisted members who earn at least 70 retirement points during each of three consecutive anniversary years in the Coast Guard Reserve.

The consecutive three-year period is computed from the member’s anniversary date.

The Armed Forces Reserve Medal is awarded to members of the Armed Forces Reserve, including Coast Guard Reservists, for ten years of satisfactory service over a twelve-year period. This is based on retirement years, in which 50 points are required per year.

The same rules apply for each succeeding ten-year period a member serves.

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<b>References</b>	Reserve Policy Manual, COMDTINST M1001.28A Personnel and Pay Procedures Manual, PSCINST M1000.2A Medals and Awards Manual, COMDTINST M1650.26C
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<b>Additional Information</b>	Personnel Service Center: <a href="http://www.uscg.mil/hq/psc/index.htm">http://www.uscg.mil/hq/psc/index.htm</a>
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## Chapter 5 – Human Resources

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## Direct Access

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### General Information

Direct Access (DA) is the Coast Guard's online human resource and information website. Coast Guard active duty and reserve personnel have the ability to view and update information without the need to be at a Coast Guard facility.

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### Self-Service Users

All reserve members are designated Self-Service Users. To sign into Direct Access, members must click on the yellow "Self-Service Users" tab at the top of the screen. A PeopleSoft page will appear. The User ID is the member's employee identification number (EMPLID), unless assigned a different number by Customer Care. Passwords are member's Social Security Number (SSN) unless the member changed it or was assigned a different number by Customer Care.

Members do not need to log into the system to access general information. Members may navigate DA by clicking on the Contents, Index, Search, Glossary, or Frequently Asked Questions tabs.

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### Personnel Users

The Command User role in PeopleSoft provides the user with the ability to access the Self-Service for Commands functions of the system. It is a powerful, multipurpose role, intended for use by trusted, mature and responsible members of the command cadre. The Command User has the ability to:

- (1) [Schedule and approve \(for payment\) reserve IDT drills.](#)
- (2) Initiate and view enlisted evaluations (employee reviews)
- (3) [Access the Airport Terminal](#), which provides a list of personnel in receipt of orders to or from the unit and the ability to [view, modify and print travel orders](#)
- (4) [Generate and view member competency reports](#)
- (5) Print CG-4170, BAH/Emergency/Dependency Data forms
- (6) View command information including [roster](#) and [personnel allowance list](#)
- (7) View member service record information ([CG Member Info](#)) including assignment history, competencies, training history, contact telephone numbers and address

The unit Commanding Officer/Officer in Charge or Executive Officer/Executive Petty Officer must designate Command Users.

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## Direct Access (Continued)

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### Personnel Users (continued)

To sign in to Direct Access, members must click on the yellow “Personnel Users” tab at the top of the screen. A PeopleSoft page will appear. The User ID is the member’s employee identification number (EMPLID), unless assigned a different number by Customer Care. Passwords are member’s Social Security Number (SSN) unless the member changed it or was assigned a different number by Customer Care.

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### Personnel User Access

Members must apply for Personnel User authority. The Coast Guard PeopleSoft User Access Authorization form (CG-PSC 7421/2) is needed for this process.

Member:

- (1) Complete items 1 through 6 on CG-PSC 7421/2
- (2) Choose the appropriate User Role-"CGEMPREV--Employee Review Only"
- (3) Submit to Unit Commanding Officer

Commanding Officer:

- (1) Sign and date item 8 (Note: The CO/OIC may delegate this authority to the XO/XPO; forms signed "By direction" will not be approved by PSC)
- (2) Return to member requesting access authorization

Member:

- (1) Sign and date item 10
- (2) Fax completed form to PSC at (785) 339-3772

Units should retain the original form until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked. To terminate Command User designation and privileges, have the member sign the acknowledgment in Section 3 of CG-PSC Form 7421/2 and fax to the Personnel Service Center at (785) 339-3772.

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### Self-Service Tasks

Members can update personal and financial information via Direct Access.

Home > Self-Service > Employee > Tasks

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## Direct Access (Continued)

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### **Self-Service Tasks (continued)**

The following may be updated or accessed under the “Tasks” tab:

- (1) Languages
- (2) Memberships (Professional Organizations)
- (3) E-mail Addresses
- (4) Emergency Contacts
- (5) Home and Mailing Addresses
- (6) Phone Numbers
- (7) Allotments
- (8) Direct Deposit
- (9) W-4 Tax Information
- (10) State Tax Information
- (11) Create E-Résumé
- (12) Review My Résumé
- (13) Annual Screening Questionnaire
- (14) Schedule Drills
- (15) TDY Orders
- (16) Orders
- (17) Reserve Orders
- (18) Self-Service Reserve Orders
- (19) All Duty
- (20) Contingency Operations
- (21) Thrift Savings Plan
- (22) Diversity Update

Home > Self-Service > Employee > View

The following may be accessed under the “View” tab:

- (1) View Paycheck
- (2) Test Results
- (3) Personal Information
- (4) Member Information
- (5) View My Worklist
- (6) My CGHRMS Orders
- (7) My Employee Reviews
- (8) Employee Review Summary
- (9) Off Comparison Scale Summary
- (10) Member Training Rating
- (11) SWE PDE
- (12) SWE Profile Letter
- (13) My Credit Card Data

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## Direct Access (Continued)

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### Inactive Duty Training (IDT) Drills

Members may submit Inactive Duty Training (IDT) drill requests through Direct Access, preferably at least two weeks before the drill date. DA combines the request, routing, approval processes, order issuance, and payroll transactions into one event.

Home > Self-Service > Employee > Tasks > Schedule Drills > Add/Schedule New Drill

Members enter the desired IDT dates and times, duty/drill type, meal code (if authorized), pay code, and all other required information (when drill is member requested, drill status will be “Mbr Requested,” the only status available).

Click “Save” when finished.

The reservist, supervisor (with Reserve IDT access role), or Personnel Reporting Unit (SPO) may schedule or edit a drill up to and including the drill date. After the drill day, only a Command User or SPO may complete, edit, un-excuse, or cancel the drill.

If the reservist changes a drill date after it has been authorized, the status returns to “Mbr Requested.” The supervisor may reset the status to “Pending” again, but it is not required.

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### Annual Screening Questionnaire (ASQ)

At the beginning of every fiscal year all reservists, regardless of component category, are required to fill out the Annual Screening Questionnaire (ASQ). This survey ensures vital recall information is accurate. Members are required to answer the ASQ even if no information has changed over the past year.

Home > Self-Service > Employee > Tasks > Annual Screening Questionnaire

Fill out the ASQ acknowledgement. The choices are “I understand and accept” and “I do not understand or do not accept.” If you select “I understand and accept” choose “Available” in the Recall Availability dropdown.

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## Direct Access (Continued)

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### Annual Screening Questionnaire (ASQ) (continued)

If “I do not understand or do not accept” option is selected, this may have serious repercussions, could result in a temporary transfer to the Standby Reserves or a discharge. Contact your supervisor immediately if this answer is selected.

Once this acknowledgement is complete, click on “Personal Information.” Update any invalid information. Click “Save” when finished.

Reservists whose e-mail addresses are entered in DA will have an ASQ reminder sent to them each year.

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### User Help

Personnel Service Center (PSC) has created a new customer service division focused on one-stop shopping for active duty and reserve pay, travel (including auxiliary and civilian travel) inquiries, and user support for the Unit Travel System (UTS) and DA.

Members with Direct Access questions or problems may submit an online trouble-ticket.

Additionally, members may call the customer care line at (866) PSC-USCG (772-8724) or (785) 339-2200, 0700-1630 Monday through Friday, Central Time.

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### References

Direct Access  
ALCOAST 057/02

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### Additional Information

Direct Access: <http://www.uscg.mil/hq/psc/cghrms/>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
PSC Topeka: <http://www.uscg.mil/HQ/PSC/>

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## Reserve Medical and Wellness Issues

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### **General Information**

Reservists are required to be physically qualified for service. Periodic dental and physical exams aid in ensuring readiness. In addition to physical examinations, all members will be weighed in each April and October.

Commanding officers are responsible for the medical and dental readiness of Selected Reserve (SELRES) members assigned to their units.

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### **Fit For Full Duty (FFFD)**

Reservists are deemed either Fit For Full Duty (FFFD) or Not Fit For Full Duty (NFFD). An FFFD finding will be made if a member's record indicates they are physically and mentally able to perform their duties.

Members may be considered NFFD when one or more physical or mental disability (injury or illness) prevents, or could prevent, personnel from performing the normal and reasonable duties of their office, grade, rank or rating.

If one part of the medical requirement is missing or expired, the medical report is not valid. If a member's medical has lapsed the member is considered NFFD.

Once the discrepancy is cleared, the member is returned to an FFFD status.

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### **Physical Examinations**

Reserve members must receive a physical exam quinquennially, or once every five years from age 20 to 50. Policy requires reservists whose age ends in "0" or "5" be examined. For example, a 28-year old must receive a physical during the month of their 30<sup>th</sup> birthday, and again when they turn 35.

After age 50, an annual physical is required.

Physical examinations provided to reservists as part of the

demobilization process are valid for five years. It is recommended that the member be examined on their next “0” or “5” birthday for easier record keeping and continuity.

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## **Reserve Medical and Wellness Issues (Continued)**

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### **Physical Examinations (continued)**

A complete physical examination is required within 12 months of retirement, involuntary separation, or release from active duty (RELAD) into the Ready Reserve (selected drilling or Individual Ready Reserve). The physical examination shall follow the guidelines set forth for quinquennial physicals.

Other members separating from the Coast Guard, e.g. discharge or transfer to Standby Reserve (non-drilling) may request a medical and/or dental examination.

A modified physical examination is required for all personnel departing for an overseas assignment for 60 consecutive days or greater, and annually for Port Security Unit (PSU) personnel. This will help identify and resolve health related issues prior to deployment, if no significant medical status changes have occurred.

The medical screening includes, but is not limited to the following:

- (1) Eye examination
- (2) Hearing test
- (3) Blood test/lipid screening
- (4) Urinalysis
- (5) Physical examination
- (6) Dental examination

Additional blood screenings are administered every five years to members 35 years of age and older and to those under 35 with certain cardiac risks, including tobacco use. Electrocardiograms (EKG) are administered annually for members over 40 years of age.

Members must bring any civilian records that will change or update their medical readiness, including vaccination records.

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### **Female Health Requirements**

In addition to the required physical examinations, females must undergo extra health screenings.

All females are required to undergo a pelvic examination and obtain appropriate cancer screenings every two years to keep their physicals current. Females over the age of 40 are required to receive biannual mammograms.

## Reserve Medical and Wellness Issues (Continued)

### Female Health Requirements (continued)

Though both procedures are required, the Coast Guard will not pay for screenings or civilian doctor visits. A Readiness Management Period (RMP) and travel funds may be authorized for military or civilian doctor visits.

### Male Health Recommendations

In addition to the required physical examinations, it is recommended that males over the age of 50 receive colonoscopies. The procedure is simply a recommendation; the Coast Guard will not reimburse members who undergo the procedure at a civilian facility.

An RMP and travel funds may be authorized for military or civilian doctor visits.

### Eye Examinations

Members required to wear prescription eyewear must have their eyes examined every two years. The Coast Guard does not pay for the examination if performed by a civilian doctor.

If a member's vision is correctable to 20/25 or better, a biannual examination is not required. Members shall then have their eyes examined as part of their quinquennial physical, or every year if the member is over 50 years old.

If a local military treatment facility (MTF) is available, members may request an eye examination at a military clinic.

The exam may be performed at an MTF, but not the subsequent treatment. Military physicians may recommend and require follow-up examinations, but do not provide such services to reservists.

If a routine Coast Guard physical examination determines a member needs eyeglasses, the member is responsible for going to a civilian doctor for treatment. The physical examination will not be approved until a civilian facility determines a member has corrected the vision.

impairment. The Coast Guard does not reimburse members for this required outside visit.

An RMP and travel funds may be authorized for the medical appointment.

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## Reserve Medical and Wellness Issues (Continued)

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### **Dental Examinations**

All SELRES members are required to receive an annual Type II dental examination (requires use of a light, mirror and X-rays) and be medically cleared for service. The purpose of the examination is to assess of the state of a member's dental health for the next 12 months and aids in determining one's fitness for prolonged duty without ready access to dental care. Reservists not in Dental Class I or II are not ready for worldwide deployment.

Commanding officers shall ensure members complete dental exams at Coast Guard clinics using Inactive Duty Training (IDT) drills or RMPs. Members not screened at Coast Guard clinics may be screened at local Department of Defense dental treatment facilities or civilian providers providing they follow Maintenance and Logistics Command (MLC) direction.

The Coast Guard mandates only an exam; a dental cleaning is not required. Payment for dental cleaning and follow-up dental treatment is not authorized.

Dental examination results are recorded in the Dental Common Access System (DENCAS).

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### **Dental Examination Forms and Reimbursement**

Reservists being examined by their civilian dentist must provide an Active Duty/Reserve Forces Dental Examination Form (DD-2813) to the doctor.

Members are responsible for submitting their completed DD-2813 to unit medical personnel.

The Coast Guard will reimburse reservists for dental exams at civilian facilities. Members must mail copies of the bill, DD-2813, and X-rays (if taken) with a completed Champus Claim Patient's Request for Medical Payment form (DD-2642) to their servicing MLC.

RMPs and travel funds may be authorized for dental visits.

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## Reserve Medical and Wellness Issues (Continued)

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<b>Dental Examination Results</b>	<p>Dental examination results fall in to one of three categories:</p> <p>Class I: Member FFFD-patient has good oral health and is not expected to require dental treatment or reevaluation for 12 months</p> <p>Class II: Member FFFD-minor work needs to be done; patient has some oral conditions but conditions are not expected to result in dental emergencies within 12 months if not treated</p> <p>Class III: Member NFFD-major work needs to be done: patient has oral conditions that are expected to result in dental emergencies within 12 months if not treated</p> <p>All members of the Coast Guard are required to maintain a Class I or II rating.</p>
<b>Change of Classification</b>	<p>Members in a Class III status must obtain the treatment necessary to earn a Class I or II rating. Dental procedures associated with a raise in classification are not reimbursable and travel funds are not authorized.</p> <p>Members whose dental class has improved must notify the Coast Guard. A DD-2813 reflecting the change of classification should be submitted to the member's unit. Upon receipt, the member will have satisfied the dental readiness requirements and may be placed in an FFFD status.</p>
<b>Examination Reminders</b>	<p>Coast Guard medical personnel review records annually. Members will be contacted if immunizations or medical and dental exams are required or will soon expire.</p>
<b>Readiness</b>	<p>Coast Guard medical personnel with input authority shall enter the date</p>

**Management System (RMS)** of the most recent approved physical into the Medical Readiness System (MRS).

Supervisors have access to the Readiness Management System (RMS). This allows members with supervisory authority to check the overall physical readiness of those assigned to their unit. This system is read-only. RMS data is compiled from MRS information.

## Reserve Medical and Wellness Issues (Continued)

### Maximum Allowable Weight Program

Members must be weighed each April and October, eliminating the birth month, promotion, and advancement requisite weigh-ins.

Commanding Officers (including Area, Maintenance and Logistics Command, District, Sector Commanders, Commanding Officers, and Officers-in-Charge) shall ensure weigh-ins are completed within the designated month and data is recorded in Direct Access for each member assigned to their respective unit.

Members away from their unit for six weeks or less during the weigh-in months will have their weigh-ins deferred until they return to their home unit.

Commands will ensure that reservists are assessed during their scheduled drills in April and October.

### Weight Standards

Administrative personnel conduct the biannual weigh-ins. Maximum Allowable Weight (MAW) standards are based on individual height and wrist circumferences.

Members meeting MAW standards should ensure the results are properly recorded via Direct Access and continue to follow their basic fitness plan.

Members in compliance with MAW standards, but within ten pounds of their MAW, are encouraged to complete a Personal Wellness Profile (PWP). Plans are available from Unit Health Promotion Coordinators.

Members exceeding their MAW by 35 pounds or less will have their body fat percentage measured by Administrative personnel. A medical officer shall evaluate those with body fat percentages exceeding the

Maximum Allowable Body Fat (MABF) limits.

Personnel exceeding their MAW by 36 pounds or more will be immediately processed for separation.

Administrative personnel will adjust maximum allowable weight limits for members over their MAW but within the acceptable body fat standards. The permissible weight limit will be changed to the member's current weight.

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## **Reserve Medical and Wellness Issues (Continued)**

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### **Members Over MAW Standards**

Personnel not in compliance with MAW standards shall be referred to a medical officer or local physician for medical evaluation. The medical officer or local physician will make recommendations to commands regarding the member's health. Based on the physician's findings, members may be required to participate in a physical fitness program. An RMP and travel funds may be authorized for the medical appointment.

The assignment of reservists to any duty (EAD, ADSW, ADT-OTD, etc.) other than IDT and ADT-AT will not be approved.

Reservists on active duty are subject to the same physical fitness standards as active duty personnel.

A member with an underlying medical condition limiting or prohibiting participation in a specific portion of the fitness assessment will be excused from only that portion of the fitness assessment test, but must continue to participate in weekly fitness enhancing activities outlined in their detailed fitness plan. Alternate fitness assessments may be authorized.

Any member found to have an underlying medical condition making fitness activities detrimental to their health is still responsible for meeting MAW standards within the timeline specified by their probationary period, unless it is determined that the member is fit for temporary limited duty.

A member is referred to a medical officer or local physician for exceeding their MAW will be given a referral for one visit to a

registered dietician for counseling. An RMP and travel funds may be authorized for the appointment.

---

**Time Limitations** Members in the probationary weight and fitness program are granted limited time to lose the excess weight. The probationary weight loss period shall equal the amount of time it would take the member to lose all excess weight at an average of one pound per week or one percent body fat per month, whichever is greater.

The probationary period shall not equal or exceed 36 weeks.

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## **Reserve Medical and Wellness Issues (Continued)**

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**Time Limitations (continued)** If fitness assessment standards are met, but the member is not in compliance with MAW standards, the member's weekly fitness activities no longer need monitoring. The member is still responsible for complying with MAW standards and will be required to complete the physical assessment on a monthly basis until the weight is lost.

Members reaching their MAW but are still unable to meet the fitness standards will be removed from the weight program. Mandatory fitness training and monthly physical assessments will no longer be required.

Members unable to comply with the MAW standards will be discharged.

Any member who is placed on the weight probationary program twice in any 365-day period will be processed for separation from the Coast Guard.

---

**Fitness Assessment**

Unit Health Promotion Coordinators (UPHC) will administer the assessment battery on a monthly basis to all active duty and reservists on active duty who exceed their MAW.

Three key factors in fitness are aerobic capacity, muscular strength, and muscular endurance. Aerobic capacity and cardiovascular fitness is the component of fitness that relates mostly to health and the ability to do vigorous, sustained physical activity.

The requisite three-part battery for members exceeding their MAW consists of a 1.5-mile run, a sit-up test, and a push-up test.

At the discretion of an approving medical official, a one-mile walk test or a 12-minute swim test may be substituted for the 1.5 mile run. An abdominal curl test may be an authorized substitute for the sit-up test. A bench press test may be an authorized substitute for the push-up test.

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**Personal Wellness Profile (PWP)**

The Personal Wellness Profile (PWP) is a self-administered questionnaire designed to evaluate lifestyle habits and provide suggestions to modify risky behaviors. A physical fitness assessment can also be administered as a part of the PWP to evaluate current fitness levels and make recommendations for improvement.

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**Reserve Medical and Wellness Issues (Continued)**

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**Personal Wellness Profile (PWP) (continued)**

All information collected by the PWP is confidential. This information will be used in the following limited applications:

- (1) Preparation of individual sealed reports returned to the participant
- (2) Development of anonymous group reports for organizational needs
- (3) Limited research application to improve health care delivery and job site safety. The information will not be used for any other administrative or disciplinary purposes

The only exception to this confidentiality is in cases where an individual could hurt himself or herself or another. In these cases, appropriate personnel within the Work-Life Staff shall be notified to provide appropriate care.

The following services are available as a part of the PWP:

- (1) Weight Analysis

- (2) Weight Loss Recommendations
- (3) Body Composition Analysis
- (4) Resting Pulse & Blood Pressure Screening
- (5) Cholesterol Screening
- (6) Physical Fitness Assessment
- (7) Flexibility Assessment
- (8) Waist-to-Hip Ratio Assessment
- (9) Nutritional Analysis and Recommendations
- (10) Fitness Recommendations
- (11) Heart Health Analysis

All participants will receive a confidential written report. The Personal Wellness Profile is an educational report designed to help identify health risks and assist individuals when making decisions on how to improve diet and exercise. It is not a diagnosis of medical problems. Individuals with specific medical problems or needs should consult with physicians.

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**Annual Basic  
Fitness Plan**

The Coast Guard Fitness Program is designed to improve the health and fitness of the workforce.

All members of the Coast Guard are required to develop an Annual Basic Fitness Plan and present the plan to supervisors for review during the member's evaluation period.

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**Reserve Medical and Wellness Issues (Continued)**

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**Annual Basic  
Fitness Plan  
(continued)**

At a minimum, the Basic Fitness Plan should include vigorous cardio-respiratory endurance training three times a week for thirty minutes each session and strength training one to three times per week.

All personnel on active duty, including reserve members on Active Duty for Training (ADT) orders, are authorized a minimum of one hour, three times per week during working hours for voluntary participation in fitness enhancing activities. Training centers are not required to allocate time for physical enhancement during the academic day for "A" and "C" school students.

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**Pregnancy and the  
Weight Program**

Members who become pregnant will not be weighed to determine compliance with Coast Guard policy until they return to an FFFD status. Members placed in a weight or fat loss probationary status prior to pregnancy shall have their probationary period held in abeyance.

Coast Guard women are exempt from weight and body fat standards during pregnancy and for six months after delivery. The grace period is extended to twelve months after delivery if the member is nursing.

A member's spot on the advancement list will be held until the expiration of the eligibility list.

---

**Pregnancy**

Pregnancy is not a disease or illness covered under the Reserve disability system. A reservist unable to perform their duty as a result of pregnancy or childbirth is not eligible for incapacitation benefits.

In an uncomplicated pregnancy, a physically fit, trained servicewoman working in a safe environment should have little need for duty restrictions. Some pregnant servicewomen may have a heightened susceptibility to certain stresses; therefore on occasion, a normal pregnancy may require job and/or watch modification on an individual basis.

The Coast Guard does not permit pregnant women to perform physical duties that threaten the pregnancy or assign them beyond the availability of medical attention, for example: to shipboard duty, boat crews or vessel inspection teams.

The Office of Health and Safety (G-K) establishes Coast Guard policy for protecting pregnant members for occupational-related hazards.

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**Reserve Medical and Wellness Issues (Continued)**

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**Pregnancy  
(continued)**

Maintenance and Logistics Command (MLC) Health and Safety Divisions will, upon request, provide guidance and direction to commanding officers on how to protect the health of pregnant servicewomen from occupational hazards.

Females in the SELRES on inactive duty who become pregnant or give birth to a child, shall be retained in the Ready Reserve for the remainder of the period specified in their enlistment contract or commissioning agreement. However, before a pregnant servicewoman can perform IDT or ADT or undertake any travel associated with such duty, she shall obtain written authorization from her attending physician. Commands may also reschedule IDT drills and ADT in accordance with Chapters 2 and 3 of the Reserve Policy Manual, to accommodate the pregnant reservist.

Informal counseling and advisement outlined in Article 9.A.2.a of the Personnel Manual shall be adjusted to include the following additional information

- (1) The member's responsibility for maintaining satisfactory participation in the Selected Reserve as outlined in Chapter 4 of the Reserve Policy Manual.
- (2) The member's entitlement or lack of entitlement to general healthcare benefits (Note: reservists are not entitled to routine healthcare while on inactive duty or while on active duty for a period of 30 days or less. When ordered to active duty for 31 days or more, reservists are enrolled in TRICARE Prime and routine care will be provided for the duration of the active duty period). Reservists who become injured or ill while in a duty status are subject to guidelines in Chapter 6 of the Reserve Policy Manual.

Pregnant reservists shall not be involuntarily mobilized, but they may volunteer for active duty. Mobilization for new mothers (by birth or adoption) shall be deferred for six months from the time of delivery or placement in home.

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## Reserve Medical and Wellness Issues (Continued)

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### **Transitional Healthcare Benefits**

Reservists and their dependants are eligible for transitional health care benefits when the member separates from active duty. Transitional health care benefits are available to:

- (4) Reservists recalled to active duty in support of a contingency operation for periods of more than 30 days
- (5) Members who are separated from active duty after being involuntarily retained on active duty in support of a contingency operation
- (6) Members separated from active duty following a voluntary agreement to stay on active duty for a period of less than one year in support of a contingency operation

If a reservist served less than six years total in active federal military services, health benefits end 60 days after the separation date. If a member has six years or more of total active federal service, benefits

end 120 days after the separation date.

The family members of the reservist eligible for transitional health care are also eligible.

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**References**

Reserve Policy Manual, CONDTINST M1001.28A  
 Coast Guard Personnel Manual, COMDTINST M1000.6A  
 Coast Guard Medical Manual, COMDTINST M6000.1B  
 Personnel and Pay Procedures Manual, PSCINST M1000.2A  
 Allowable Weight Standards for Coast Guard Military Personnel, COMDTINST M1020.8E  
 Coast Guard Health Promotion Manual, COMDTINST M6200.1  
 Pregnancy in the Coast Guard, COMDTINST 1900.9  
 ALCOAST 329/04

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**Additional Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
 Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>  
 TRICARE: <http://www.tricare.osd.mil>  
 MTF Locator: <http://www.tricare.osd.mil/mtf/>  
 Physical Fitness Standards: [http://www.uscg.mil/hq/g-w/g-wk/wkw/pdf/MAW\\_fitness\\_test\\_standards.pdf](http://www.uscg.mil/hq/g-w/g-wk/wkw/pdf/MAW_fitness_test_standards.pdf)  
 Weight Standards: [http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM\\_1020\\_8E.pdf](http://cgweb.uscg.mil/g-c/g-ccs/g-cit/g-cim/directives/CIM/CIM_1020_8E.pdf)

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## Command Handling of Personnel Injury

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**General Information**

Reservists must immediately reports, to their commands, any injuries, scheduled surgeries, or illnesses. Members shall notify their command at the onset of incapacitation, physical condition, or other factors affecting the member's immediate availability for military service.

Injuries or medical conditions not incurred or aggravated while in a duty status are the responsibility of the member.

Members are entitled to Coast Guard incapacitation benefits only when injuries occur or are aggravated while on military orders.

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**Civilian Medical Examinations**

Medical conditions not incurred while in a duty status shall be addressed by a civilian doctor at no cost to the Coast Guard. Civilian

doctors shall report the severity of injury, estimated period of impairment, and anticipated disposition. The doctor's findings and duty status recommendations shall be forwarded to the member's command.

After being cleared by a civilian doctor, the member must be cleared by a Coast Guard medical officer before returning to a drilling status.

Reservists with long-term injuries that have occurred while in a civilian status may be evaluated by military medical for fitness for duty prognosis and/or qualification for retention.

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**Command  
Notification and  
Required Actions**

Reservists are responsible for reporting injuries, illnesses, or scheduled medical procedures that will limit a member's performance or recall availability.

Commands shall document all injuries or illnesses reported by reservists and shall ensure the member seeks the appropriate medical care. A report of a reservist's maladies will be documented in their Coast Guard medical record through a narrative type SF 600 (Chronological Record of Medical Care) entry. The servicing ISC (pf) and Coast Guard Personnel Command-Reserve Personnel Management Division (CGPC-rpm) shall be notified of such reports.

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## Command Handling of Personnel Injury (Continued)

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**Duty Status**

Reservists are deemed Fit For Full Duty (FFFD), Fit For Limited Duty (FFLD), or Not Fit For Full Duty (NFFD). An FFFD finding will be made if a member is physically and mentally able to perform their duties.

Members may be considered NFFD when one or more physical or mental disability (injury or illness) prevents, or could prevent, personnel from performing their normal and reasonable duties.

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**Members With Over  
Eight Years of  
Active Duty Service**

Commands overseeing reservists with medical conditions not incurred while in a duty status with more than eight years of active duty service shall contact CGPC-adm-1 to identify need for a physical evaluation

board.

Members with less than eight years of active duty service may request a waiver of physical standards IAW chapter 3 of the Medical Manual. If the request for a waiver is approved by CGPC-rpm the member will be returned to duties as assigned. If the request for a waiver is denied by CGPC-rpm, the unit will process the member IAW chapter 8.D of the RPM. A complete flow chart for Disqualifying Conditions Not Incurred in a Duty Status may be found at the CGPC-rpm website <http://www.uscg.mil/hq/cgpc/rpm/ResIncapFlo123Feb04.pdf>.

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**Reexamination and Reinstatement**

Upon completion of treatment or recovery a civilian healthcare provider shall re-examine the member. Members shall forward the determination to their command.

After a civilian physician has medically cleared a reservist, the member must be cleared by Coast Guard medical personnel and placed in an FFFD status.

Readiness Management Periods (RMP) and travel funds may be authorized for military doctor visits.

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**Military Obligations**

A reservist able to perform military duties shall be allowed to attend IDT drills in a Fit For Limited Duty (FFLD) status at the discretion of the command if appropriate training can be accomplished.

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**Command Handling of Personnel Injury (Continued)**

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**Military Obligations (continued)**

Members able to perform military duties but not authorized to attend IDT drills shall be allowed to make up drills missed due to their limited duty status.

ADT shall be scheduled when the member is Fit For Full Duty.

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**Active Duty for Health Care and Notice of Eligibility**

Active Duty for Health Care (ADHC) is special voluntary active duty for members requiring long term medical care or health evaluation. It is not a supplement to, or extension of, any active duty service and should not be confused with demobilization-related medical holds or other orders for 31 days or more as addressed by U. S. Code.

A reservist who incurs or aggravates an injury, illness, or disease in the line of duty, or while traveling to or from the place at which that member is to perform or has performed duty, may be entitled to ADHC benefits.

ADHC is applicable to reservists working and traveling under the following types of orders:

- (1) Active duty for a period of less than 30 days
- (2) Inactive Duty Training (IDT) drills
- (3) Service on funeral honors duty

A member is not entitled to military health benefits when the injury, illness, or disease is the direct result of the member's misconduct or gross negligence.

Members eligible for ADHC receive the medical or dental care appropriate for the treatment of the injury, illness, or disease until the resulting disability cannot be materially improved by further hospitalization or treatment.

If a member opts not to be retained on active duty for the duration of recovery, they are entitled to receive military medical treatment via a Notice of Eligibility (NOE). The NOE may also allow the injured reservist to receive incapacitation pay. The amount awarded shall be the lesser of the lost civilian income or estimated Coast Guard pay as though the member was on active duty.

Commands should complete an NOE in accordance with the Reserve Policy Manual.

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## Command Handling of Personnel Injury (Continued)

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### **Active Duty for Health Care and Notice of Eligibility (continued)**

Commands shall contact the servicing ISC (pf) to discuss options available to the reservist to receive medical benefits.

CGPC-rpm authorizes ADHC orders.

When declared Fit For Full Duty (FFFD) and released from ADHC, commands shall notify CGPC-rpm and the servicing ISC (pf).

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Medical Manual, COMDTINST M6000.1B

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**Additional  
Information**

U. S. Coast Guard Reserve: <http://www.uscg.mil/reserve/reshmpg.html>  
CGPC-rpm: <http://www.uscg.mil/hq/cgpc/rpm/rpmhome.htm>

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## **DEERS Enrollment and Identification Cards**

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**General  
Information**

The Defense Eligibility Enrollment Reporting System (DEERS) is a computerized information system containing over 13 million beneficiary records linked by an extensive communications network to Uniformed Services installations. DEERS data is used to provide information for identification card issuance and to verify and confirm eligibility for individuals entitled to member benefits.

Common Access Cards (CAC) are the identification cards used by members of the Uniformed Services, and when applicable, their dependents. The Uniformed Services include the Army, Navy, Marine

Corps, Air Force, Coast Guard, the Commissioned Corps of the Public Health Service, and the National Oceanic and Atmospheric Administration (NOAA).

---

**Additional Guidance** DEERS information should be kept current at all times. Upon enrollment, entitlement information is entered in the database. Whenever a member or their dependent goes to a personnel office or military treatment facility, eligibility can be immediately confirmed.

When family members become eligible or ineligible for benefits, the sponsor must act promptly to update the appropriate information in DEERS.

DEERS is updated when a sponsor's or their dependents' identification card is renewed.

The Department of Defense uses the information to forecast, request funding, and allocate resources for the building and staffing of hospitals, schools, and commissaries.

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**DEERS Registration** Members and their dependents must complete the Application for Uniformed Service Identification Card/DEERS Enrollment (DD-1172) to be entered into the database. The form is available online or through the member's unit.

Sponsors should be present when dependent identification cards are issued. If the sponsor is not present, a DD-1172 is to be signed by the sponsor before requesting issuance.

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## **DEERS Enrollment and Identification Cards (Continued)**

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**Required Documentation**

To enroll in DEERS, members should bring the following information, as applicable, to the personnel office:

- (1) Retirement orders
- (2) Certificate of Release or Discharge from Active Duty (DD-214)
- (3) Photo identification (driver license, passport, city or state-issued identification)
- (4) Birth certificates
- (5) Adoption papers and court documents
- (6) Court orders establishing paternity for illegitimate children
- (7) Marriage certificates
- (8) Death certificates
- (9) Social Security Card

**Identification Card Eligibility**

Personnel eligible for an identification card include:

- (1) Active, reserve, and retired members
- (2) Spouses (and former spouses under certain circumstances)
- (3) Un-remarried widows or widowers
- (4) Children between 10 and 21 (including adopted children and step-children)
- (5) Children under 10 if they are not living with a family member who is eligible for an identification card or under other special circumstances
- (6) Unmarried children between the ages of 21 and 23 who are full-time college students (students must provide a letter of certification from the school registrar)
- (7) Unmarried children over 21 who are incapable of self-support due to a physical or mental handicap

**Reserve Members on Active Duty**

Reserve members are eligible for active duty identification cards when performing active duty or active duty for training in excess of 30 days. Their legal dependents are eligible for identification cards at this time.

**Red or Green Identification Cards**

Red or green laminated paper identification cards are no longer valid. Per ALCOAST 013/04, all active duty and Selected Reserve members were to be issued Common Access Cards (CAC) by 01 April 2004.

The dependents of military personnel are issued a Uniform Services Identification and Privilege Card DD Form 1173, not CACs.

**DEERS Enrollment and Identification Cards (Continued)**

**New Cards** Members and their dependents are entitled to new identification cards under the following circumstances:

- (1) Card expired
  - (2) Card damaged
  - (3) Member promoted or advanced
  - (4) Member-enlisted or service has been extended
  - (5) Member brought on active duty for greater than 30 days
  - (6) Member released from active duty (RELAD)
  - (7) Card lost or stolen
- 

**Identification Card Re-issuance Documentation** Members requiring new identification cards should bring the following to the issuing center:

- (1) Card expired: Old card and other photo identification
  - (2) Card damaged: Old card and other photo identification
  - (3) Member promoted or advanced: Leave and Earning Statement (LES) showing advancement or copy of Headquarters Advancement Message
  - (4) Member enlisted or service extended: Copy of re-enlistment contract or extension paperwork
  - (5) Member brought on active duty for greater than 30 days: Orders
  - (6) Member released from active duty (RELAD): DD-214 and active duty identification card
  - (7) Card lost or stolen: Another form of identification
- 

**Identification Card Facilities** A new software application enables personnel offices to produce identification cards for each Uniformed Service. The software creates the graphics for each card based on the person's status and branch of service. The appropriate seal and format will be printed on the card; the branch of service of the issuing facility does not matter.

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**Local Issuing Facilities** CACs can be issued by any DEERS issuing facility. For information concerning DEERS automated files, members may contact their local identification card issuing office, call 1-800-538-9552, or go to <http://www.dmdc.osd.mil/rsl/>. This website lists the three closest issuing facilities by a person's zip code, city, or state.

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## DEERS Enrollment and Identification Cards (Continued)

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**Lost or Stolen Cards** If an identification card is lost or stolen, members must contact their local issuing facility immediately. Replacement cards will quickly be issued. Members must bring another form of identification and a Leave and Earning Statement, if applicable.

If the missing card is found or recovered, it is to be turned in to the proper military authority.

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**Medical Care** Reservists should update pertinent DEERS information for themselves and their dependents. Sponsors and family members lose access to their TRICARE health benefits when “loss of eligibility” appears in DEERS. Beneficiaries are then unable to make medical appointments, get prescriptions, or have claims processed.

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**Social Security Cards** A Social Security Card is an acceptable form of identification. If a card has not been issued for a spouse or new child, the dependent will be entered in DEERS for medical coverage only. The courtesy period of eligibility will expire after 90 days unless a Social Security Card is issued and recorded in DEERS. Updating DEERS does not automatically enroll a member in TRICARE; all must enroll for health coverage.

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**Surrender of Identification Cards** Identification cards shall be surrendered:

- (1) Whenever a new card is issued, except to replace a lost or stolen card
- (2) Upon expiration
- (3) Whenever the cardholder becomes ineligible by reason of age, divorce, attainment of self-support, or other reasons
- (4) Upon death
- (5) When an un-remarried or unmarried spouse or former spouse subsequently remarries
- (6) Whenever the sponsor is officially placed in a deserter status
- (7) When requested by a responsible officer for administrative purposes
- (8) When a card becomes mutilated
- (9) Upon cancellation of entitlement by proper authority for misuse

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## DEERS Enrollment and Identification Cards (Continued)

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### **DEERS Disenrollment**

A dependent must be disenrolled from DEERS when one of the following occurs:

- (1) Divorce/Annulment
- (2) Legal Separation/Interlocutory Divorce
- (3) Death
- (4) Turns 21 and does not go to college
- (5) Turns 23
- (6) Gets married
- (7) Enters the military

To terminate the dependent in DEERS, the dependent's identification card and proper documentation must be brought to the issuing facility. Proper documentation includes birth certificates, death certificates, court orders, or decrees of divorce.

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### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
Coast Guard Personnel Manual, COMDTINST M1000.6A  
Personnel and Pay Procedures Manual, PSCINST M1000.2A  
Identification Cards for Members of the Uniformed Services, Their Family Members and Other Eligible Personnel, COMDTINST M5512.1A

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### **Additional Information**

Facility Locator: <http://www.dmdc.osd.mil/rsl/>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>

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## Vehicle Registration Decals and Facility Access Control

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### General Information

Privately owned vehicle (POV) access to and operation on government facilities is a privilege and not the right of any individual.

The POV Decal is not a pass. The decal is property of the Government and shall be permanently affixed to the vehicle to which it was issued at all times. It shall be surrendered when required by the appropriate authority.

Not every Coast Guard facility may issue vehicle decals. Only units whose application for designation as an issuing authority has been favorably considered for designation by their District Security Manager (SECMGR), favorably endorsed by their Area SECMGR, and approved by the Office of Security Policy and Management (CG-86) may issue decals and tabs.

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### Vehicle Decal Policy

Access to a Coast Guard facility is at the discretion of the facility's commanding officer. Commanding officers are the final authority for determining whether or not an individual has on-base driving privileges.

The POV Decal is not to be used as the sole means to determine a POV or POV owner's authorization to enter a Coast Guard facility. In addition to a decal, following forms of identification must be presented to security personnel:

- (1) Active Duty, Reservists, and Retired personnel and dependants must show a valid military identification card or locally authorized photo identification facility pass
  - (2) Auxiliary personnel must present a valid auxiliary identification card or locally authorized photo identification facility pass
  - (3) Civilian employees shall present a valid Coast Guard civilian identification card or a locally authorized photo identification facility pass
- 

### Eligibility

Personnel eligible for POV Decals include:

- (1) Active duty and Reserve Coast Guard personnel
- (2) Active duty and Reserve members of other armed forces
- (3) Dependents of active duty and reserve members, retired military members and dependents, and widows and widowers of

deceased members as long as they continue to retain authorized military privileges

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## Vehicle Registration Decals and Facility Access Control (Continued)

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### Registration Requirements

Individuals who request POV registration or re-certification, must demonstrate a need for vehicular access to the facility and shall provide the following documents:

- (1) Valid Federal government identification card
- (2) Valid state motor vehicle driver license for the type of vehicle being registered
- (3) Valid state certificate of vehicle registration in the name of the individual registering the vehicle (POVs with temporary registration are not eligible for decal issuance until a permanent state registration is presented to the unit)
- (4) Proof of compliance with minimum requirements of the financial responsibility, compulsory insurance, or no fault insurance laws of the state in which the vehicle is registered, or of the state in which the unit is located if no financial responsibility is required by the state of registry
- (5) Proof of compliance with all applicable requirements of any vehicle inspection and maintenance program, established by the state or jurisdiction in which the unit is located, regardless of state of registry of vehicle

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### Application Chain of Responsibility

All members desiring a Coast Guard POV Decal shall bring the aforementioned documents to their local issuing authority. Mail order registration is not authorized.

At the local issuing authority:

Applicant:

- (1) Fill out a Certificate of Compliance-Private Motor Vehicle Registration Form (CG-3308A)
- (2) Submit required documentation

Reviewing Official:

- (1) Verify supporting documents
- (2) Review CG-3308A
- (3) Issue decal

Applicant:

- (1) Affix decal as directed
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## Vehicle Registration Decals and Facility Access Control (Continued)

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**Decal Display**

The POV Decal and expiration tabs must be readily visible to security forces. Unless prohibited by state or local law, the decal shall be permanently affixed on the outside, top center of the windshield, above the rear-view mirror.

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**Expiration**

Each POV Decal is valid for four years. The colored expiration tab indicates the month and year of expiration. The top number is either 01 or 07, indicating an expiration month of January or July. For security purposes, expiration tabs are only available for these two months. The bottom number indicates the year of expiration.

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**Expiration Tab Colors**

Officer (Active/Reserve/Retired): Blue  
Enlisted (Active/Reserve/Retired): Red  
Civilian Employee (Current/Retired): Green  
Auxiliary: Silver  
Contractor: Black

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**References**

Physical Security and Force Protection Program, COMDTINST M5330.1C

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**Additional Information**

Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>

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## Servicemembers' Group Life Insurance (SGLI)

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### General Information

Servicemembers' Group Life Insurance (SGLI) is a program of low cost group life insurance for military members. The following reserve members have full-time coverage under SGLI:

- (1) Reservists on active duty or Active Duty for Training-Annual Training (ADT-AT)
  - (2) Reservists on Inactive Duty Training (IDT)
  - (3) Reservists assigned to the Selected Reserve (SELRES) assigned to a unit or position in which the reservists may be required to perform active duty or active duty for training, and each year will be scheduled to perform at least twelve periods of inactive duty training that is creditable for retirement
- 

### Coverage

Coverage is automatically set up for members, but is not mandatory. Coverage is automatically increased to the maximum amount upon mobilization. Recalled reservists are also covered for 120 days following separation or release from duty.

If the member does not desire continued maximum coverage after demobilization, the member must submit a new SGLI Election and Certificate (SGLV-8286) immediately.

SGLI coverage is currently available in \$10,000 increments up to the maximum of \$250,000.

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### Amendment Process

The process to change coverage amounts, beneficiaries, or opt to decline coverage is as follows:

Member:

- (1) Fill out SGLI Election and Certificate (SGLV-8286)
- (2) Sign in front of witness (authorized Coast Guard representative)
- (3) Submit form to unit admin

Unit Admin:

- (1) Forward original form to Coast Guard Personnel Command-Administration Division, Records Branch (CGPC-adm-3)

- (2) Forward copy to member's Personnel Reporting Unit (SPO)
- (3) Forward copy to the member

## **Servicemembers' Group Life Insurance (SGLI) (Continued)**

### **Amendment Process**

**(continued)**

SPO:

- (1) Enter updated information in Direct Access

### **Veterans' Group Life Insurance (VGLI)**

The following reserve members do not have coverage under SGLI, but may elect coverage under Veterans' Group Life Insurance (VGLI):

- (1) Reservists in the Individual Ready Reserve (IRR)
- (2) Reservists in the Retired Reserve (RET-1, RET-2)
- (3) Reservists who were covered by SGLI who separate from active duty, active duty for training, or the SELRES

Requests for coverage under VGLI must be made within 120 days of entry into one of the three statuses, and enrollment must be effected through the Office of SGLI.

### **References**

Reserve Policy Manual, COMDTINST M1001.28A  
 Coast Guard Personnel Manual, COMDTINST M1000.6A  
 Personnel and Pay Procedures Manual, PSCINST M1000.2A

### **Additional Information**

SGLI & VGLI: <http://www.insurance.va.gov/>  
 Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>

## Reserve Tax Benefits

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### General Information and Definitions

Adjusted gross income - total income minus certain adjustments, deductions, and personal exemptions.

Deduction - a justifiable item or expenditure subtracted from gross income to reduce the amount of income subject to [tax](#).

Exemption - a deduction allowed by law to reduce the amount of income that would otherwise be taxed. An exemption is based on a status or circumstance rather than economic standing.

Exempt income - certain types of tax-free income. Examples of exempt income include gifts under \$10,000, death benefits, health benefits, and some scholarships.

Gross income - for individuals, this is how much you make before taxes. It is the figure people are looking for when they ask how much you gross a month.

Net income - an individual or company's total [earnings](#), reflecting revenues adjusted for costs of doing business, depreciation, interest, taxes, and other expenses.

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### Gross Income

Members of the Armed Forces receive many different types of pay and allowances. Some are included in gross income while others are excluded. Included items are subject to tax and must be reported on tax returns. Excluded items are not subject to tax, but may have to be shown on tax returns.

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### Non-Deductible Income

Non-deductible items are included in gross income, unless the pay is for service in a combat zone. Non-deductible items include:

- (1) Basic Pay:
  - (a) Active duty
  - (b) Attendance at a designated service school
  - (c) Back wages

- (d) Drills
  - (e) Reserve training
  - (f) Training duty
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## Reserve Tax Benefits (Continued)

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### Non-Deductible Income (continued)

Non-deductible items include: (continued)

- (2) Special Pay
  - (3) Bonuses
  - (4) Other Payments:
    - (a) Accrued leave
    - (b) High deployment per diem
    - (c) Continental Cost of Living Allowance
  - (5) Incentive Pay:
    - (a) Flight
    - (b) Hazardous duty
    - (c) High altitude/Low open (HALO)
- 

### Deductible Income

The exclusion of certain items when determining income applies whether the item is furnished in kind or is a reimbursement or allowance. There is no exclusion for the personal use of a government-provided vehicle. Deductible income items include:

- (1) Living Allowances:
  - (a) Basic Allowance for Housing (BAH), any type
  - (b) Basic Allowance for Subsistence (BAS)
  - (c) Cost of Living Allowance-Outside the Continental U. S. (OCONUS COLA)
  - (d) Overseas Housing Allowance (OHA)
- (2) Moving Allowances
- (3) Travel Allowances:
  - (a) Annual round trip for dependent students
  - (b) Leave between consecutive overseas tours
  - (c) Reassignment in a dependent restricted status
  - (d) Per diem
- (4) Combat Zone Pay
- (5) Family Allowances:
  - (a) Certain educational expenses for dependents
  - (b) Emergencies
  - (c) Evacuation to a place of safety
  - (d) Separation
- (6) Death Allowances

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## Reserve Tax Benefits (Continued)

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**Deductible Income  
(continued)**

Deductible income items include: (continued)

(7) Other Payments:

- (a) Disability
- (b) Professional education
- (c) Uniform allowances
- (d) Uniforms furnished to enlisted personnel
- (e) Group term life insurance

Survivor and retirement protection plan premiums

(8) In-Kind Military Benefits

- (a) Legal assistance
  - (b) Medical/dental care
  - (c) Commissary/exchange discounts
- 

**State Taxes**

Some states do not tax military income from reservists on active duty outside their state of legal residence. Members must submit a state tax withholding form to their state of residence to claim exemption.

This exemption currently applies to residents of Arizona, California, Connecticut, Minnesota, Missouri, Montana, New Jersey, New York, Oregon, Pennsylvania, Vermont, and Puerto Rico.

Refer to your state's tax website for guidance.

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**Travel  
Reimbursement**

Members of a Reserve component of the Armed Forces can deduct travel expenses for any period during which they are more than 100 miles away from home in connection with reserve duties. This is no longer a miscellaneous itemized deduction.

The deduction is limited to the amount the federal government pays its employees for travel expenses. For more information about this limit, see *Per Diem and Car Allowances* in Chapter 6 of IRS Publication 463.

A meeting of an Armed Forces reserve unit is a second place of business if the meeting is held on a day on which you work at your

regular job. Members can deduct the expense of getting from one workplace to the other.

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## Reserve Tax Benefits (Continued)

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### **Travel Reimbursement (continued)**

Travel expenses cannot be deducted if the reserve meeting is held on a day on which you do not work at your regular job. In this case, your transportation generally is a non-deductible commuting expense. However, you can deduct your transportation expenses if the location of the meeting is temporary and you have one or more regular places of work.

If you ordinarily work in a particular metropolitan area but not at any specific location and the reserve meeting is held at a temporary location outside that metropolitan area, you can deduct your transportation expenses.

If you travel away from home overnight to attend reserve duty, you can deduct your travel expenses.

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### **Uniforms**

Reservists usually cannot deduct uniform cost or upkeep. Generally members must wear uniforms when on duty and may wear them when off duty.

If military regulations prohibit wearing certain uniforms off duty, members can deduct the cost and upkeep of the uniforms, but members must reduce their expenses by any allowance or reimbursement received.

Expenses for the cost and upkeep of the following articles are deductible:

- (1) Military battle dress/operational dress uniforms and utility uniforms if you cannot wear them off duty
  - (2) Articles not replacing regular clothing, including insignia of rank, corps devices, epaulets, aiguillettes, and swords
  - (3) Reserve uniforms if you can wear the uniform only while performing duties as a reservist
-

**Hazardous Duty  
Areas and Combat  
Zones**

Members serving in a qualified hazardous duty area designated by statute are afforded the same benefits as members serving in a combat zone designated by Executive Order.

In the event an area ceases to be a combat zone (by Presidential Executive Order or by statute), the IRS will do its best to notify you. Many of the relief provisions will end at that time.

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**Reserve Tax Benefits (Continued)**

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**Professional Dues**

Members can deduct dues paid to professional societies directly related to you military position. However, members cannot deduct amounts paid to an officers' club or a non-commissioned officers' club.

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**Educational  
Expenses**

Reservists may deduct work-related educational expenses. Members may deduct the costs of qualifying education.

Qualifying education meets at least one of the following two requisites:

- (1) The education is required by your employer of the law to keep you present salary, status, or job. The required education must serve a bona fide business purpose to the employer
- (2) The education maintains or improves skills needed in your present work

Even if the education meets one or both of the above criteria, it is not qualifying education if it:

- (1) Is needed to meet the minimum educational requirements of your present trade or business
- (2) Is part of a program of study that will qualify you for a new trade or business

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**References**

Personnel and Pay Procedures Manual, PSCINST M1000.2A  
IRS Armed Forces Tax Guide-Publication No. 3  
IRS Travel, Entertainment, Gift, and Car Expenses-Publication No. 463

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**Additional  
Information**

IRS: <http://www.irs.gov>  
Armed Forces Tax Guide: <http://www.irs.gov/pub/irs-pdf/p3.pdf>  
Travel, Entertainment, Gift, and Car Expenses Guide:  
<http://www.irs.gov/pub/irs-pdf/p463.pdf>  
Combat Zones:  
<http://www.irs.gov/newsroom/article/0,,id=108331,00.html>

Military Allowances: <http://www.dtic.mil/perdiem/rateinfo.html>

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## Education Assistance

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### **General Information**

The Coast Guard highly encourages all members to further themselves through formal advanced education. A multitude of financial resources are available to help create an educated and more capable workforce.

Financial assistance available to reservists include:

- (1) Tuition Assistance
- (2) Coast Guard Mutual Assistance Supplemental Education Grant
- (3) Coast Guard Foundation Grant
- (4) Montgomery G. I. Bill

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### **Tuition Assistance**

The Tuition Assistance (TA) program assists eligible Coast Guard active, reserve, and civilian personnel in their professional development by providing funding for off-duty voluntary education courses to broaden their academic or technical background. TA is intended as a grant to help defray out-of-pocket tuition expenses. Requests for TA must be submitted and approved before the class registration deadline.

All courses must be taken from a nationally or regionally accredited institution resulting in college credit or accredited clock or contact hours.

Tuition Assistance shall be paid up-front for coursework that follows the traditional semester time period (less than 18 weeks). For courses longer than 18 weeks, the member will be reimbursed upon successful completion. All courses shall be related to Coast Guard missions or to the individual's career and professional development.

Grades are to be mailed to the Naval Education and Training Professional Development and Technology Center (NETPDTC) no later than 60 days after the course ending date. If grades are not reported to NETPDTC, members are responsible for repaying all advanced TA funds.

Tuition Assistance is for military members and civilians working for the Coast Guard only. Family members are not entitled to TA funds.

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## Education Assistance (Continued)

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<b>Tuition Assistance (continued)</b>	Expenses covered by TA funds include tuition, laboratory, studio, shop fees and consumable supplies required for the course. TA does not cover the cost of textbooks, student activity fees, parking fees or general and technology fees. Coast Guard Mutual Assistance provides funding for these expenses.
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<b>Tuition Assistance Eligibility</b>	<p>Officers, enlisted personnel, and Coast Guard civilian personnel are eligible for Tuition Assistance. No retirees or members of the Individual Ready Reserve (IRR) may apply.</p> <p>Enlisted members do not incur a service duty obligation, but must complete the course of instruction prior to being released from active duty, discharge, retirement or termination of selected reserve status. Officers agree not to request to be release from active duty, separation, retirement, or termination of selected reserve status for one year after competing courses.</p> <p>Members of the Selected Reserves (SELRES) must maintain at least a “satisfactory participation” record, or perform at least 90% of the required annual Inactive Duty Training (IDT) drills and 12 days of Active Duty for Training-Annual Training (ADT-AT) per fiscal year.</p>
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<b>Tuition Assistance Chain of Responsibility</b>	<p>Member:</p> <ol style="list-style-type: none"> <li>(1) Consult with ESO, determine courses to be taken</li> <li>(2) Fill out Application For Off-Duty Tuition Assistance form (CG-4147)</li> <li>(3) Submit form to ESO at least 10 days before the school-established registration deadline</li> </ol> <p>ESO:</p> <ol style="list-style-type: none"> <li>(1) Review form</li> </ol>
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(2) Forward to Coast Guard Institute

Coast Guard Institute:

- (1) Review request
- (2) If not approved, return to servicing ESO
- (3) If approved, enter into database
- (4) Issue TA Authorization Form (CGI-Form 1560) to member

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## Education Assistance (Continued)

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### **Tuition Assistance Chain of Responsibility (continued)**

Member:

- (1) Take TA Authorization Form to school when registering
- (2) Attend class as scheduled

School:

- (1) Send invoice to NETPDTC

Member:

- (1) Finish course
- (2) Authorize release of grades to NETPDTC

NETPDTC:

- (1) Release funds to school

School:

- (1) Receive payment
- 

### **Coast Guard Mutual Assistance Supplemental Education Grant**

The CGMA Supplemental Education Grant (SEG) Program offers financial assistance by reimbursing certain costs associated with seeking a first undergraduate degree, a Vocational and Technical Training certificate, or a General Equivalency Diploma (GED) not otherwise covered by Coast Guard Tuition Assistance or similar programs.

Students who have undergraduate degrees and are seeking a second degree at the same level, or who are seeking a graduate degree are not eligible for funds.

CGMA will reimburse funds each calendar year for documented education costs specifically required by a course of study.

Military members, spouses, and dependent children are eligible to receive this grant.

Reimbursable items may include, but are not limited to:

- (1) Registration Fees
- (2) Enrollment Fees
- (3) Lab Fees
- (4) Activity Fees

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## Education Assistance (Continued)

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### **Coast Guard Mutual Assistance Supplemental Education Grant (continued)**

Reimbursable items may include, but are not limited to: (continued)

- (5) Graduation Fees
- (6) Textbooks
- (7) Lab Books
- (8) Workbooks
- (9) Study Guides
- (10) Art Supplies
- (11) Audio-Visual Tapes
- (12) Scientific or Graphing Calculators

Applications are available online or from your local CGMA representative.

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### **Coast Guard Foundation Grant**

The Coast Guard Foundation Grant is for active duty personnel and reservists who have been on active duty for at least one year (on Extended Active Duty contracts, Active Duty Special Work in Support of the Active Component, and Title 10 mobilized reservists). Grant information is posted annually on the Coast Guard Message System or available through unit Education Services Officers.

The grant program is for E-3 to E-9 personnel, though not everyone submitting a request will be approved. Members must comply with the requirements listed in the in ALCOAST solicitation message to be considered for approval.

The Coast Guard Foundation Enlisted Education Grant approval board will convene monthly at the Institute to determine approved applicants. Approved applicants will receive a check in the mail at the address listed on their completed request form. Non-approved applicants will be notified via e-mail.

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**Montgomery G. I. Bill**

The Montgomery G. I. Bill (MGIB)-Selected Reserve is an educational assistance program enacted by Congress to attract high quality members to go into the reserves.

Members may use this education assistance program for degree programs, certificate or correspondence courses, cooperative training, independent study programs, apprenticeship/on-the-job training, and vocational flight training programs. Remedial, refresher and deficiency training are available under certain circumstances.

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**Education Assistance (Continued)**

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**Montgomery G. I. Bill (continued)**

Reserve members using their MGIB benefits must be in the SELRES, or serving in an active duty status. Members not in the SELRES or serving in an active capacity will have benefits suspended until placed back in a drilling status.

Coast Guard SELRES officials determine eligibility. The Department of Veterans Affairs (VA) makes the payments for this program.

Reservists may use the MGIB and TA at the same time, so long as the funds are not paying for the same courses. For example, a member enrolled in four classes may use TA for two classes and their MGIB benefits for the other two.

Contact your servicing ESO or refer to the MGIB web page for complete information.

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**References**

Coast Guard Tuition Assistance Program, COMDTINST 1500.24  
Reserve Policy Manual, CONDTINST M1001.28A

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**Additional Information**

Coast Guard Institute: <http://www.uscg.mil/hq/cgi/index.html>  
Tuition Assistance: [http://www.uscg.mil/hq/cgi/ta\\_page.html](http://www.uscg.mil/hq/cgi/ta_page.html)  
CGMA Grant: <http://www.cgma.org/Assistance/Education/seg.htm>  
CG Foundation Grant:  
<http://www.uscg.mil/hq/cgi/tuition/foundation.html>  
MGIB: <http://www.gibill.va.gov/education/c1606.htm>  
Forms and Worksheets: <http://www.uscg.mil/hq/psc/forms/index.htm>

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## Mutual Assistance

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### General Information

Coast Guard Mutual Assistance (CGMA) is a non-profit, charitable organization providing financial aid to entire Coast Guard community, primarily through interest-free loans, grants, and financial counseling.

CGMA is not part of the Coast Guard and does not receive federal funding. CGMA is separate from the Combined Federal Campaign (CFC) program.

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### Eligibility

Everyone associated with the Coast Guard family, except those on the CGMA restricted list, is eligible to receive assistance, including active duty, reserve and retired personnel, and civilian employees. Auxiliary members may apply for aid, but certain restrictions apply.

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### Assistance

CGMA offers assistance in the form of:

- (1) Interest-free loans
- (2) Personal grants
- (3) Education grants
- (4) Federal Student Loan origination fee refunds
- (5) Free confidential financial counseling and referral services

Assistance provided typically falls in to the following categories:

- (1) Unexpected financial and personal loss
- (2) Emergency travel
- (3) Unexpected medical bills not covered by insurance
- (4) Education needs
- (5) Pay, allotment, and travel claim problems
- (6) Major car repairs

- (7) Housing needs
  - (8) Budget counseling and credit management
- 

**Supplemental  
Education Grant**

The CGMA Supplemental Education Grant (SEG) Program offers financial assistance by reimbursing certain costs associated with seeking a first undergraduate degree, a Vocational and Technical Training certificate, or a General Equivalency Diploma (GED) not otherwise covered by Coast Guard Tuition Assistance or similar programs.

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**Mutual Assistance (Continued)**

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**Supplemental  
Education Grant  
(continued)**

This program is for individuals seeking their first degree. Students who have undergraduate degrees and are seeking a second degree at the same level, or who are seeking a graduate degree are not eligible for funds.

CGMA will reimburse funds each calendar year for documented education costs specifically required by a course of study.

Military members, spouses, and dependent children are eligible to receive this grant.

Reimbursable items may include, but are not limited to:

- (1) Registration Fees
- (2) Enrollment Fees
- (3) Lab Fees
- (4) Activity Fees
- (5) Graduation Fees
- (6) Textbooks
- (7) Lab Books
- (8) Workbooks
- (9) Study Guides
- (10) Art Supplies
- (11) Audio-Visual Tapes
- (12) Scientific or Graphing Calculators

Applications are available online or from your local CGMA representative.

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**References**

Coast Guard Mutual Assistance Publications

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**Additional  
Information**

Mutual Assistance: <http://www.cgmahq.org/>

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## **Government Travel Charge Cards**

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**General  
Information**

The Government Travel Charge Card program was established to significantly reduce the need to provide government travelers with cash and travel advances. The program helps members to avoid using personal funds for lodging, meals, car rentals, and transportation costs.

The Citibank MasterCard government travel card is mandatory for payment of transportation by commercial carriers.

Purchases are for official government purposes and therefore tax-exempt.

Members shall safeguard cardholder account information when managing and disposing of financial reports received from the card-issuing bank.

Reservists requiring a Permanent Change of Station (PCS) transfer must inform their unit's credit card coordinator. The card will remain valid until expiration, but a new coordinator will be assigned at the new unit.

Separating or retiring members shall contact their unit's card coordinator to close their accounts.

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**Application Chain  
of Responsibility**

Member:

- (1) Fill out Citibank Government Travel Card (Individually Billed Account) Setup Form (CB004 ½ Final 03/19/04)
- (2) Submit to unit travel card coordinator

Unit Travel Card Coordinator:

- (1) Review application
- (2) Sign form
- (3) Fax to Citibank for processing

Citibank:

- (1) Approve application
- (2) Issue travel charge card

Member:

- (1) Upon receipt, call Citibank to activate card
- (2) Use card for official or government travel-related charges
- (3) Pay bill in a timely fashion

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## Government Travel Charge Cards (Continued)

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### Credit Card Limit

The spending limit for new government charge cards is \$1.00. Unit travel charge card coordinators adjust the amount as deemed appropriate and when members are on travel orders. Members who need to make travel arrangements must contact their unit travel charge card coordinator at their servicing ISC to adjust the credit card spending limit. This prevents unauthorized usage and helps the Coast Guard track travel-related costs.

### Authorized Usage

Charge cards are only to be used for travel-related costs when performing official duties. Authorized charges include transportation costs, lodging, car rentals, meals, and gasoline.

The only person authorized to use the card is the person whose name appears on the credit card. Permitting card use to others, even within the same program office or activity, may result in disciplinary action and could result in cancellation of cardholder privileges.

### Additional Cardholder Responsibilities

The cardholder is responsible for executing transactions within the limits of their procurement authority, command guidance, and applicable contracts. The cardholder shall verify the following:

- (1) Purchases and credits itemized on the monthly statement of account are only for goods or services received or returned
- (2) Sales tax has not been charged
- (3) Merchants have not charged the account prior to the date of shipment

- (4) Merchants have not passed on their MasterCard interchange fees to the government

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**Travel Claims and Reimbursement**

Reimbursements of travel-related costs are provided through travel claims. A Travel Voucher (DD-1351-2) should be submitted no later than three days after the completion of travel. Once the claim has been processed and reimbursement funds issued, members should ensure funds are allocated for the government credit card charges.

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**Government Travel Charge Cards (Continued)**

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**Split Disbursement**

Split disbursement is a block on the travel claim enabling members to authorize payments from the travel claim reimbursement directly to their Citibank Travel Card account balances. Although not mandatory, the use of split disbursements is recommended.

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**Credit Card Bills**

Each member in possession of a government-issued travel charge card is responsible and liable for the complete and timely payment of all charges. Bills are mailed to the member's home address.

If payment is more than 60 days late, commands will be notified and proactive action taken. If payments are more than 120 days delinquent, Citibank will begin garnishment procedures. Failure to pay the full amount may result in counseling, a negative page 7 letter, garnished wages, administrative separation, or punitive action under the Uniform Code of Military Justice. Failure to make full and timely payments will also result in the indefinite cancellation of an individual government credit card.

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**Late Payments**

If a payment is late, interest will be paid for the number of days late, computed at the Renegotiation Board Interest Rate. Interest is the member's responsibility and not reimbursable through travel claims or any government funds.

Citibank may file negative credit reports with the national credit

bureaus for members who fail to make a “complete and timely” payment. The negative mark will be made against an individual’s credit history.

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<b>Card Abuse</b>	Disciplinary action will be taken against individuals using a government-issued credit card for personal use. Disciplinary action can range from a letter in the member’s official permanent file to a termination action, based upon the facts involved regarding the documented personal purchases.
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<b>Checking Card Balance</b>	Members can check their credit card balance online via Direct Access:  Home > Self-Service > Employee > View > My Credit Card Data
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## Government Travel Charge Cards (Continued)

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<b>Lost or Stolen Cards</b>	If a credit card is lost or stolen, contact Citibank and their unit travel charge card coordinator immediately. Once a card is reported lost or stolen, the member has no further liability for unauthorized charges. The maximum liability under federal law is \$50.
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If a member suspects an illegal use of an account, contact Citibank and follow up with a letter. Only a letter protects personal rights under the Fair Credit Billing Act. This letter should include the member’s name, account number, and suspected erroneous charges. Citibank must receive the letter no later than 60 days after the first bill containing the error was mailed.

The card issuer must acknowledge receipt of the complaint letter, or correct the discrepancy within 30 days. If errors cannot be corrected within 30 days, Citibank must investigate and either correct the mistake or justify the charges within two billing cycles or 90 days, whichever is less.

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<b>References</b>	Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13F Travel Charge Card Program, COMDTINST 4600.14A ALCOAST 021/99, 065/00, 430/00, 087/01, 595/01, 264/04
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<b>Additional</b>	Forms and Worksheets: <a href="http://www.uscg.mil/hq/psc/forms/index.htm">http://www.uscg.mil/hq/psc/forms/index.htm</a>
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**Information**

Government Travel Charge Card Form:

<http://www.va.gov/ofinop/valociti/Forms/CBForm004.doc>

[Direct Access: http://www.uscg.mil/hq/psa/cghrms](http://www.uscg.mil/hq/psa/cghrms)

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## **Benefits and Entitlements**

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**General  
Information**

Reserve members receive regular drill pay, base pay for Active Duty for Training, and various financial entitlements and benefits. Reservists on active duty receive different pay entitlements than their counterparts not on active duty.

Special pay that members may receive includes:

- (1) Basic Allowance for Housing (BAH or BAH-II)
  - (2) Cost of Living Allowance (COLA)
  - (3) Basic Allowance for Subsistence and Commuted Rations (BAS/COMRATS)
  - (4) Per diem
  - (5) Family Separation Allowance (FSA) and Family Separation Housing (FSH)
  - (6) Uniform allowances
- 

**Basic Allowance for  
Housing**

Basic Allowance for Housing (BAH) is funding provided for housing compensation. Rates are based on housing costs in local civilian housing markets, and are payable when on active duty, including Active Duty for Training (ADT). Adjustments in the BAH rate take effect on 1 January of every year based on the Secretary of Defense's determination of housing costs in a Military Housing Area (MHA) for all members of the uniformed services entitled to BAH by location.

Members performing long-term active duty (EAD, ADSW-AC or

ADSW-RC, excluding contingencies) for a period greater than 139 days receive BAH, sometimes called BAH-I, based on the zip code of the duty station. BAH consists of the former allowances known as Basic Allowance for Quarters (BAQ) and Variable Housing Allowance (VHA) and varies by location. Members ordered to active duty for 140 days or more are entitled to BAH from the start date of the orders. If a member that originally received order for less than 140 days (and thus is entitled to BAH-II) later receives an order amendment that extends the orders past 139 days, BAH would start on the date of the amendment.

Members recalled to active duty on Title 10 in support of a contingency operation receive BAH based upon the principal place of residence from which they were recalled regardless of the length of the orders. In addition, members may be entitled to per diem if they are recalled to a location more than 50 miles from their place of residence and occupy quarters closer to their duty location. Members living more than 50

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## Benefits and Entitlements (Continued)

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### **Basic Allowance for Housing (continued)**

miles from their duty location who choose to commute between their place of residence and duty location are not entitled to per diem.

Members performing active duty (ADT or ADSW not in support of a contingency) for less than 140 days receive BAH-II. BAH-II is the equivalent to what used to be Basic Allowance for Quarters (BAQ) and does not vary by geographic location. Entitlements are divisible by 30 for calculating daily rates. For example, if a reservist is authorized 12 days of ADT, they receive 12 days of BAH-II. See Chapter 3.C of the Pay Manual, COMDTINST M7220.29(series) for additional guidance.

If a situation exists where both spouses are on active duty, the couple is entitled to both BAH payments. If the couple has dependents, one collects BAH with dependent allowances, while the other spouse collects the single rate BAH. It is advantageous for dual military families to receive BAH with dependent funds from the higher-ranking service member.

BAH, regardless of type, is tax-free.

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### **Cost of Living Allowance (COLA)**

Members in high-cost areas qualify for the continental United States cost-of-living allowance, or CONUS COLA. The allowance compensates service members for non-housing expenses in areas where

these costs exceed the national military average by more than 8 percent. Members must absorb the first 8% of expenses above the national average.

Outside CONUS Cost of Living Allowance (OCONUS COLA) is paid to members stationed in overseas high-cost areas, including Alaska and Hawaii. OCONUS COLA helps maintain relative purchase power for the like goods and services purchased in the United States. Rates fluctuate according to local and CONUS price indices.

COLA indexes have been computed for all Military Housing Areas (MHA), which represent major metropolitan areas and installations throughout the continental United States. A private contractor provides local market prices. CONUS COLA is based on the zip code of the duty station, not the member's residential zip code.

## Benefits and Entitlements (Continued)

### **Cost of Living Allowance (COLA) (continued)**

COLA rates are based on pay grade, geographic location, time in service, and dependent status.

Housing and housing related costs are covered under the Basic Allowance for Housing (BAH) and excluded from COLA.

Reserve members recalled to active duty for less than 140 days (20 weeks) are not authorized COLA unless the mobilization is in support of a contingency operation. Mobilized members are entitled to COLA at the rate prescribed for their principal place of residence.

When both husband and wife are members, each is entitled to COLA. This entitlement exists whether husband and wife maintain joint or separate residences. In no case shall a spouse on active duty be considered as a dependent for entitlement purposes. When a member-married-to-member couple maintains a joint residence with dependents, COLA is paid for one spouse at the dependent rate and for the other at the without dependent rate.

CONUS COLA is taxable; OCONUS COLA is not.

**Basic Allowance for Subsistence and Commuted Rations (BAS/COMRATS)**

Basic Allowance for Subsistence (BAS) is a non-taxable allowance to offset the cost of food for those who live off base or where government rations are not available.

When dining facilities are provided, members are entitled to full (regular) BAS, have the cost of meals deducted from their pay, and have funds available for incidental expenses. Active duty personnel and reservists, on active duty or in a drilling status, are entitled to BAS.

The three different types of BAS are:

- (1) Regular or full BAS
- (2) Partial BAS
- (3) Commuted Rations (COMRATS)

Regular BAS is payable when there are no rations-in-kind available for the member at the duty station, or when use of an available government mess is impractical and would adversely affect performance of duty.

Partial BAS is payable to all members receiving rations-in-kind.

## Benefits and Entitlements (Continued)

**Basic Allowance for Subsistence and Commuted Rations (BAS/COMRATS) (continued)**

Commuted Rations (COMRATS) is payable on a daily basis when members are:

- (1) Granted permission to mess separately where a government mess is available
- (2) Authorized Proceed Time during a Permanent Change of Station move
- (3) Under permissive travel orders
- (4) While in a travel status
- (5) While performing Temporary Additional Duty (TAD) at other than a military installation
- (6) On authorized sick leave

All officers are entitled to officer BAS except when in a leave status. Officers are not entitled to rations-in-kind and must pay for all meals obtained in a government mess.

Enlisted personnel may receive regular BAS or partial BAS, and COMRATS.

**Per Diem Allowances**

Per diem is a daily monetary allowance designed to cover the cost of food, lodging, and other subsistence expenses incurred on official

business or temporary duty in the continental United States.

Per diem rates, known as “Lodging-Plus,” are based on annual nationwide food and hotel rates. This allowance for lodging plus meals and incidentals varies by location.

When members are lodged in military housing and dining in government facilities, reimbursement is for the cost of the quarters plus the government meal rate.

Every station or government post is assigned a lodging rate, local meal rate (when government messing is not available) and proportional meals rate (when government messing is available for some meals, but not all). The proportional rate is the average of the local rate and the government meal rate. If a specific location is available, service members traveling then receive a standard rate.

## Benefits and Entitlements (Continued)

### **Per Diem Allowances (continued)**

Reservists on active duty who reside greater than 50 miles from their duty station, and where government quarters are not available, are entitled to per diem. Per diem rates are based on the station location and not the member’s zip code.

Officers and enlisted personnel receive the same per diem allowance. A member’s time-in-service, number of dependents, or pay grade is not a factor in determining the allowances received.

Per diem allowances are not taxable.

### **Family Separation Allowance (FSA) and Family Separation Housing (FSH)**

Family Separation Allowance (FSA) compensates a member for the additional expenses incurred because of a family separation. It is payable to qualified members serving inside or outside the United States. FSA is payable to members in any grade with dependents. Recalled reservists, with dependents, on active duty greater than 30 days, but less than 140 days, stationed away from their home drilling unit, and whose dependents do not accompany them to the active duty site are entitled to FSA.

FSA-T is authorized if assigned in a Temporary Duty (TDY) status. FSA-S is authorized if the member is assigned to a ship away from dependents for a continuous period of 31 days or more.

A member must be away for 30 continuous days without family visits at the onset of the mobilization to receive FSA. After the first 30 days reasonable visits are permissible, provided visits are temporary and do not exceed 30 consecutive days.

Family Separation Housing (FSH) compensates a member for the additional expenses by reason of being required to procure and maintain quarters elsewhere for dependents. It is not payable to a member assigned to any duty station under permissive, humanitarian, or mutual exchange of station orders, or to members who elect an unaccompanied tour in the United States.

FSH is only payable if government quarters are not available at the permanent duty station and if dependents are prevented from residing with the member. FSH is only payable to a reservist under Active Duty Special Work (ADSW) orders while not entitled to Permanent Duty Station (PDS) entitlements.

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## Benefits and Entitlements (Continued)

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### **Family Separation Allowance (FSA) and Family Separation Housing (FSH) (continued)**

FSH and FSA are payable in addition to any other allowance or per diem to which a member may be entitled. A member may qualify for FSH and FSA for the same period.

FSA and FSH do not accrue if all of the member's dependents reside at or near the member's duty station. The term "near the member's duty station" is defined as a commute of 50 miles or less or less than a 90-minute one-way commute.

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### **Uniform Allowances**

Enlisted members receive a Clothing Maintenance Allowance (CMA) similar to active duty enlisted personnel. The Reserve Basic Maintenance Allowance (RBMA) and Reserve Standard Maintenance Allowance (RSMA) are funds paid per drill to replace or maintain uniforms. The RBMA rates are lower because it is assumed the initial issue should last for a few years. After three years in the Reserves, the higher RSMA rates go in to effect.

Enlisted members on active duty for more than 30 consecutive days are entitled to the active duty monthly clothing maintenance allowance.

Officers do not receive a clothing maintenance allowance and must pay to maintain their uniforms. Officers instead receive a one-time allowance upon commissioning.

Officers recalled to active duty for 90 days or more may be entitled to an additional active duty uniform payment. Officers must fill out the Officer Uniform Allowance Claim Worksheet (CG-PSC-5100) to receive the allowance.

Newly issued uniforms are provided to enlisted personnel at no cost. Officers must pay for all uniform items.

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## Benefits and Entitlements (Continued)

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### Retirement Points

Reservists earn retirement points for each day of service and may earn retirement points for completed correspondence courses. The Coast Guard determines the actual retirement point value of each course.

Members earn one point for each drill, including:

- (1) Inactive Duty Training (IDT) drill
- (2) Readiness Management Period (RMP)
- (3) Funeral Honors Duty (FHD)

Reservists earn one retirement point for each day of active duty, including:

- (1) Initial Active Duty Training
- (2) Active Duty for Training-Annual Training (ADT-AT)
- (3) Active Duty for Training-Other Training Duty (ADT-OTD)
- (4) Active Duty Special Work
- (5) Extended Active Duty
- (6) Active Duty for Health Care
- (7) Mobilization Recall (Title 10 or Title 14 duty)

The accumulation of retirement points determines qualifying years of satisfactory service. Twenty years of satisfactory service is one factor in determining entitlement to retired pay

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### Commissary and Exchange Privileges

Under legislation enacted 24 Nov 2003, members of the Ready Reserve and their dependents now have unlimited access to commissary stores. Members need to present their uniformed services identification card for access. Commissary privilege cards have been discontinued.

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### References

U. S. Coast Guard Pay Manual, COMDTINST M7220.29A  
 Reserve Policy Manual, COMDTINST M1001.28A  
 Personnel and Pay Procedures Manual, PSCINST M1000.2A  
 Internal Revenue Service-Armed Forces Tax Guide-Publication No. 3

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### Additional Information

BAH: <http://www.dtic.mil/perdiem/bah.html>  
 Active Duty Allowances: <http://www.dtic.mil/perdiem/rateinfo.html>

Armed Forces Tax Guide: <http://www.irs.gov/pub/irs-pdf/p3.pdf>  
Commissary Locator: <http://www.commissaries.com/index.cfm>

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## APPENDIX A

### Acronyms

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AD	Active Duty
ADHC	Active Duty for Health Care
ADOT	Active Duty Other than for Training
ADPL	Active Duty Promotion List
ADSW-AC	Active Duty Special Work in support of the Active Component
ADSW	Active Duty Special Work
ADSW-RC	Active Duty Special Work in support of the Reserve Component
ADT	Active Duty for Training
ADT-AT	Active Duty for Training-Annual Training
ADT-OTD	Active Duty for Training-Other Training Duty
AO	Assignment Officer
AOR	Area of Responsibility
ASL	Active Status List (Standby Reserve)
ASQ	Annual Screening Questionnaire
ASVAB	Armed Services Vocational Aptitude Battery
AVCAD	Aviation Candidate Program
AWOL	Absence Without Leave
AY	Anniversary Year
BAH	Basic Allowance for Housing
BAS	Basic Allowance for Subsistence
CAC	Common Access Card
CDA	Career Development Advisor
CFC	Combined Federal Campaign
CFR	Code of Federal Regulations
CG-86	Office of Security Policy and Management
CGHRMS	Coast Guard Human Resources Management System
CGIS	Coast Guard Investigative Service
CGMA	Coast Guard Mutual Assistance
CGMS	Coast Guard Message System
CGPC-adm-3	Coast Guard Personnel Command-Administration Division, Records Branch
CGPC	Coast Guard Personnel Command
CGPC-epm	Coast Guard Personnel Command-Enlisted Personnel Management Division
CGPC-opm	Coast Guard Personnel Command-Officer Personnel Management Division
CGPC-rpm	Coast Guard Personnel Command-Reserve Personnel Management Division
CGRC	Coast Guard Recruiting Command
CIW	Career Intentions Worksheet



## Acronyms (Continued)

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CMA	Clothing Maintenance Allowance
CMC	Command Master Chief
CO/OIC	Commanding Officer/Officer-in-Charge
COLA	Cost of Living Adjustment
COLA	Cost of Living Allowance
COMRATS	Commuted Rations
CONUS	Continental United States
CPI	Consumer Price Index
CPR	Cardiopulmonary Resuscitation
CPRL	Contingency Personnel Requirements List
CSPI	College Student Pre-Commissioning Initiative
DA	Direct Access
DCA	Direct Commission Aviator
DCE	Direct Commission Engineer
DCEM	Direct Commission Environmental Management
DCIO	Direct Commission Intelligence Officer
DCL	Direct Commission Lawyer
DCO	Direct Commission Officer
DEERS	Defense Enrollment Eligibility Reporting System
DENCAS	Dental Common Access System
EAD	Extended Active Duty
EERMS	Enlisted Employee Review Management System
EERS	Enlisted Employee Review System
EIC	Experience Indicator Code
EKG	Electrocardiogram
EMPLID	Employee Identification Number
ESGR	Employer Support of the Guard and Reserve
ESO	Education Services Officer
ETR	Electronic Training Request
FFFD	Fit For Full Duty
FHD	Funeral Honors Duty
FICA	Federal Insurance Contributions Act
FSA	Family Separation Allowance
FSH	Family Separation Housing
FY	Fiscal Year
GED	General Equivalency Diploma
G-K	Office of Health and Safety
G-W	Human Resources Directorate
G-WKW	Office of Work-Life
G-WTR-1	Office of Reserve Affairs-Reserve Policy and Programs Division
G-WTR-3	Office of Reserve Affairs-Reserve Funds Management Division
G-WTR	Office of Reserve Affairs



## Acronyms (Continued)

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HDCU	Harbor Defense Command Unit
HALO	High Altitude/Low Open
IADT	Initial Active Duty Training
IDP	Individual Development Plan
IDPL	Inactive Duty Promotion List
IDT	Inactive Duty Training
IRR	Individual Ready Reserve
IRS	Internal Revenue Service
ISC (pf)	Integrated Support Command-Force Optimization and Training Branch
ISL	Inactive Status List (Standby Reserve)
JCS	Joint Chiefs of Staff
JTRU TRANSCOM	Joint Transportation Reserve Unit Transportation Command
LES	Leave and Earning Statement
MABF	Maximum Allowable Body Fat
MARGRAD	Direct Commission Maritime Academy Graduate
MARTP	Maritime Academy Reserve Training Program
MAX	Maximum Allowable Weight
MGIB	Montgomery G. I. Bill
MHA	Military Housing Area
MLC (pf)	Maintenance and Logistics Command-Force Optimization and Training Branch
MLC	Maintenance and Logistics Command
MRS	Medical Readiness System
MSO	Military Service Obligation
MSST	Maritime Safety and Security Team
MTF	Military Treatment Facility
NCWG	Naval Coastal Warfare Group
NETPDTC	Naval Education and Training Professional Development and Technology Center
NFFD	Not Fit For Full Duty
NOE	Notice of Eligibility
OCONUS	Outside the Continental United States
OCS	Officer Candidate School
OER	Officer Evaluation Report
OERS	Officer Evaluation Reporting System
OHA	Overseas Housing Allowance
OSGLI	Office of Servicemembers' Group Life Insurance
PAL	Personnel Allowance List
PCS	Permanent Change of Station
PDB	Professional Development Board
PDE	Personal Data Extract
PDIF	Personnel Data Information File



## Acronyms (Continued)

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PDR	Personnel Data Record
PDS	Permanent Duty Station
PERSRU	Personnel Reporting Unit
POV	Privately Owned Vehicle
PPEP	Pre-Commissioning Program for Enlisted Personnel
PSC (RAS)	Personnel Service Center-Retiree and Annuitant Services Branch
PSC (SES)	Personnel Service Center-Separations, Entitlements, and Debts and Service Validation
PSC	Personnel Service Center
PSRC	Presidential Selective Reserve Call-Up
PSU	Port Security Unit
PWP	Personal Wellness Profile
RAPID	Real-Time Automated Personnel Identification System
RBMA	Reserve Basic Maintenance Allowance
RCC	Reserve Component Category
RCD	Reasonable Commuting Distance
RDP	Rate Determination Package
REBI	Reserve Enlisted Basic Indoctrination
RELAD	Release from Active Duty
RETO	Reserve Enlisted Transfer Order
RMP	Readiness Management Period
ROCI	Reserve Officer Candidate Indoctrination
ROO	Reported-On Officer
ROTC	Reserve Officers' Training Corps
RPAL	Reserve Personnel Allowance List
RPA	Reserve Program Administrator
RPM	Reserve Policy Manual
RSMA	Reserve Standard Maintenance Allowance
RSWE	Reserve Service-Wide Examination
SBP	Survivor Benefit Plan
SECMGR	District Security Manager
SEG	Supplemental Education Grant
SELRES	Selected Reserve
SEPRATS	Separate Rations
SGLI	Servicemembers' Group Life Insurance
SNM	Said Named Member
SRDC	Selected Reserve Direct Commission
SSCRA	Soldiers' and Sailors' Civil Relief Act
SSN	Social Security Number
SWE PDE	Service Wide Examination Personal Data Extract
SWE	Service Wide Examination
TAD	Temporary Additional Duty



## Acronyms (Continued)

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TA	Tuition Assistance
TDY	Temporary Duty
TONO	Travel Order Number
TQC	Training Quota Management Center
TRA/PAY CAT	Training and Pay Category
TRACEN	Training Center
UCMJ	Uniform Code of Military Justice
UPHC	Unit Health Promotion Coordinator
UPH	Unaccompanied Personnel Housing
USCGA	United States Coast Guard Academy
USCGR	United States Coast Guard Reserve
USCG	United States Coast Guard
USC	United States Code
USERRA	Uniformed Services Employment and Reemployment Rights Act
UTS	Unit Travel System
VA	Department of Veterans Affairs
VGLI	Veterans' Group Life Insurance

